

OpenForms: Standard Form Fields

OpenForms: Basic Functions

OpenForms: Digital Content
Development

OpenForms: Building a Form

CoGR Governance: Web Content
Style Guide/Digital Standards

OPENFORMS | STANDARD FORM FIELDS

OVERVIEW

- CONSISTENCY·
- USER EXPERIENCE·
- MINIMAL ERRORS·

We need a standard format for form fields used across several departments for a few reasons:

- To create a consistent expectation for users and avoid confusion
- To create a better user experience, while minimizing errors.
- To minimize frustration for City staff when processing online form submissions.

NAME

- SEPARATE FIRST & LAST·
- MIDDLE INITIAL OPTIONAL·

Splitting name into *first name* and *last name* fields eliminates the need for a user to type their own spaces, which could cause entry errors.



The form layout for the Name section consists of three stacked text input fields, each with a label and a 'required' status indicator. The first field is labeled 'First Name' with a 'required' tag and contains the placeholder text 'ex) Jane'. The second field is labeled 'Middle Initial (Optional)' and is empty. The third field is labeled 'Last Name' with a 'required' tag and contains the placeholder text 'ex) Smith'. Each field has a dark blue 'Text' button with a speech bubble icon to its right.

Note: any optional fields should be labeled in parentheses after the question title (see above).

Field Types

Text

PHONE NUMBER

- NUMBER FIELD·
- NO HYPHENS OR PARENTHESES·

Using a number form field for Phone Number entry

- It sets a clear expectation for the customer.
- It helps City staff simplify the process of formatting long lists of numbers to send mass text messages.

OPENFORMS | STANDARD FORM FIELDS

Phone Number (Enter Numbers Only, No Hyphens or Spaces) required

ex) 6164563000

0 Number

Note: It's a good idea to give some instruction in the question title and provide a clear example of the format in the placeholder text.

Field Types

0 Number

OPENFORMS | STANDARD FORM FIELDS

ADDRESS

- SEPARATE FIELDS·
- NUMBER & STREET·
- CITY·
- STATE·
- ZIP CODE·

There are a few reasons to split the address field:

- It's less confusing for users, as it sets a clearer formatting expectation, minimizing entry errors
- It optimizes addresses for GIS analysis by City staff.

Your Address Heading

Number and Street required

ex) 300 Monroe Ave NW Text

City required

ex) Grand Rapids Text

State required

Dropdown

Zip Code required

ex) 49503 Number

State Dropdown Field:

- State is a dropdown field with all 50 states entered as possible selections
- This helps avoid data entry errors, minimizing spelling errors and necessary staff data cleanup
- Michigan is checked as the default option. Uncheck to remove Michigan as the default

State required

Nebraska

Michigan

Alabama

Alaska


Arizona


Arkansas


California


OPENFORMS | STANDARD FORM FIELDS

Field Types

 Heading

 Text

 Dropdown

 Number

OPENFORMS FUNCTIONS OVERVIEW

OPENFORMS INTRODUCTION

OpenForms is a powerful tool for creating online forms. You will use OpenForms to make current paper and printable PDF forms into online *smart forms*. This tool gives you the flexibility to make forms that work for you *and* your customers.

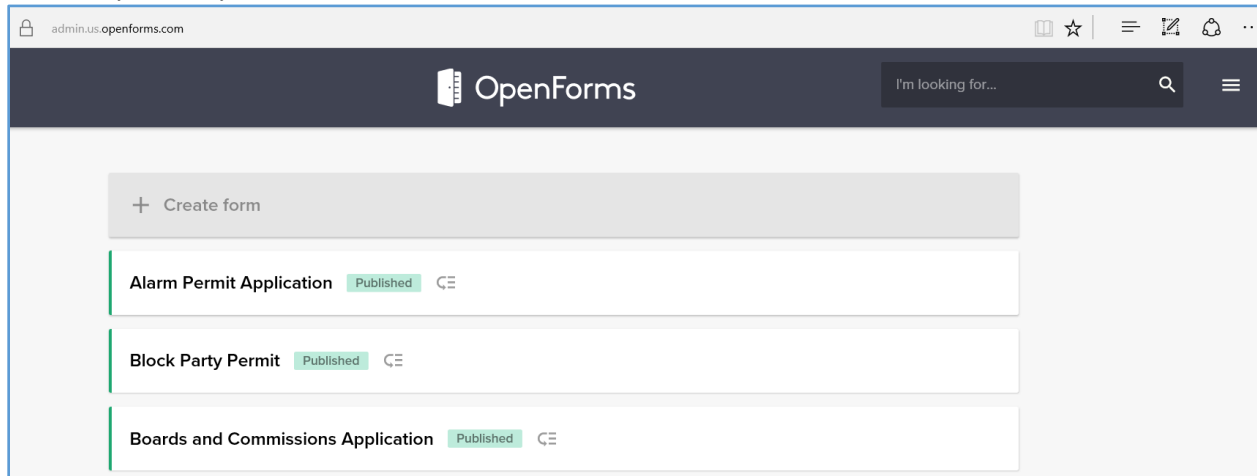


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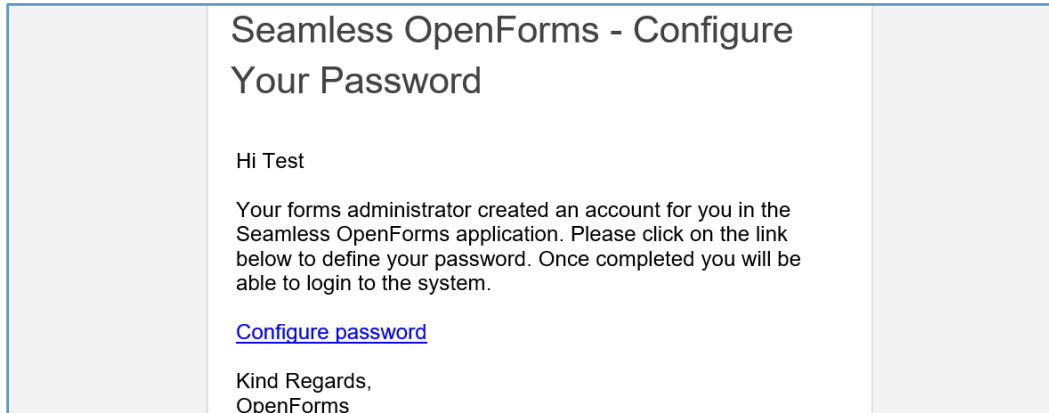
EDITING A FORM

- [Duplicate your form](#)
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NAVIGATION

ACCESSING OPENFORMS

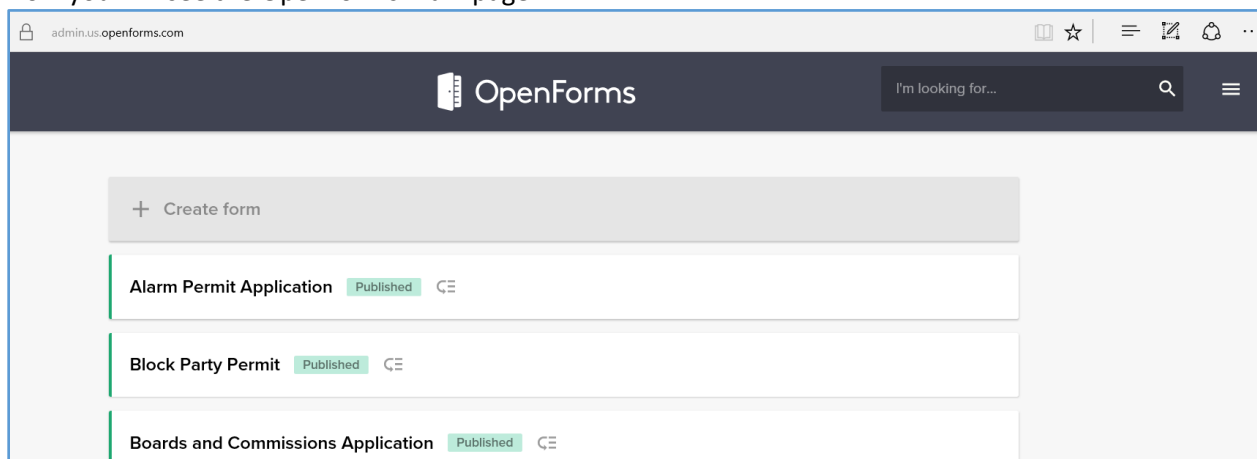
You do not access OpenForms in the OpenCities program. If you need access to OpenForms, you will get an email with a link to create a password. Your username will be the same as your City account



Follow the link and set your password.

A form titled "Set your password". Below the title, it says "Hey Test, enter a 6-15 character password below." There is a password input field with a lock icon on the left and a toggle icon on the right. Below the input field is a large red button labeled "Set password".

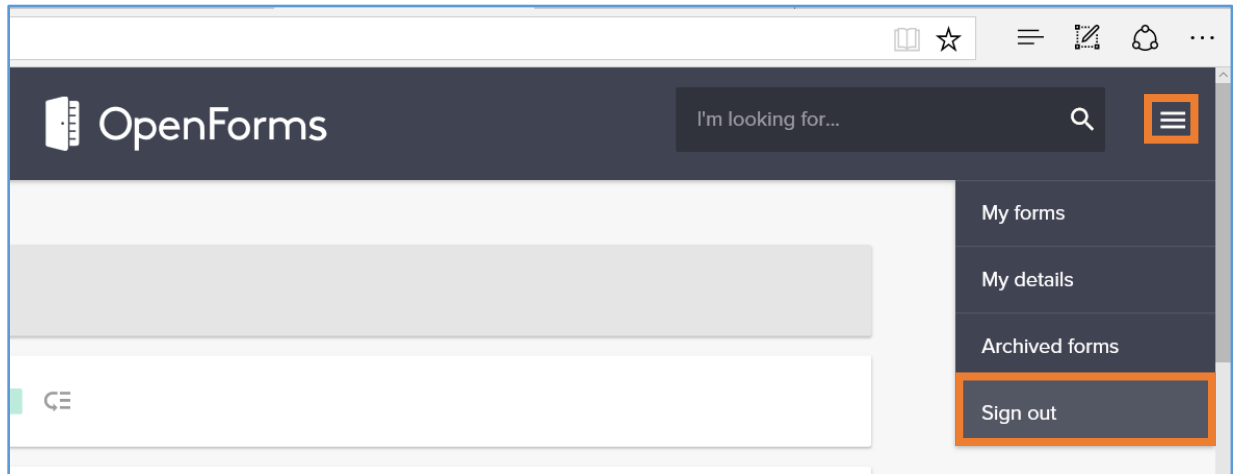
Now you will see the OpenForms main page.



SIGNING OUT

OpenForms automatically signs you out of your account after a period of inactivity. Closing your web browser also signs you out of your account.

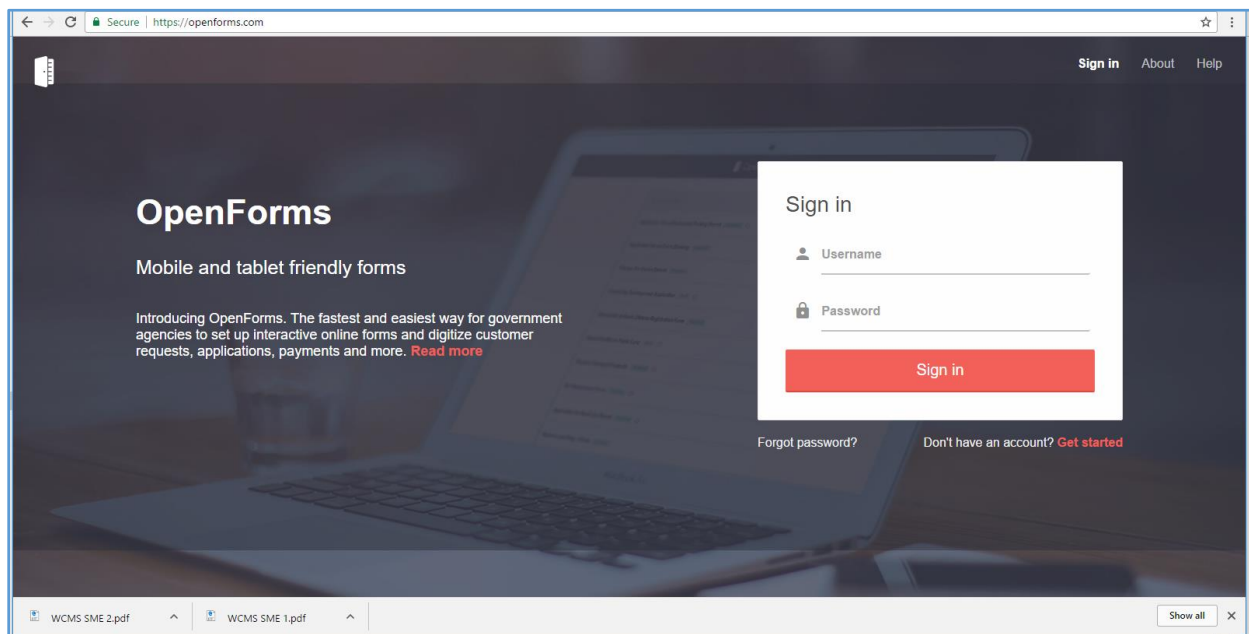
To sign out of your account manually, click the **MENU** icon, then click **SIGN OUT**.



RETURNING TO OPENFORMS

OpenForms is an internet-based software, so you do not download it to your computer.

After signing out, you can return to OpenForms by going to openforms.com and signing in with your username and password. You should bookmark this page if you plan to use OpenForms often.

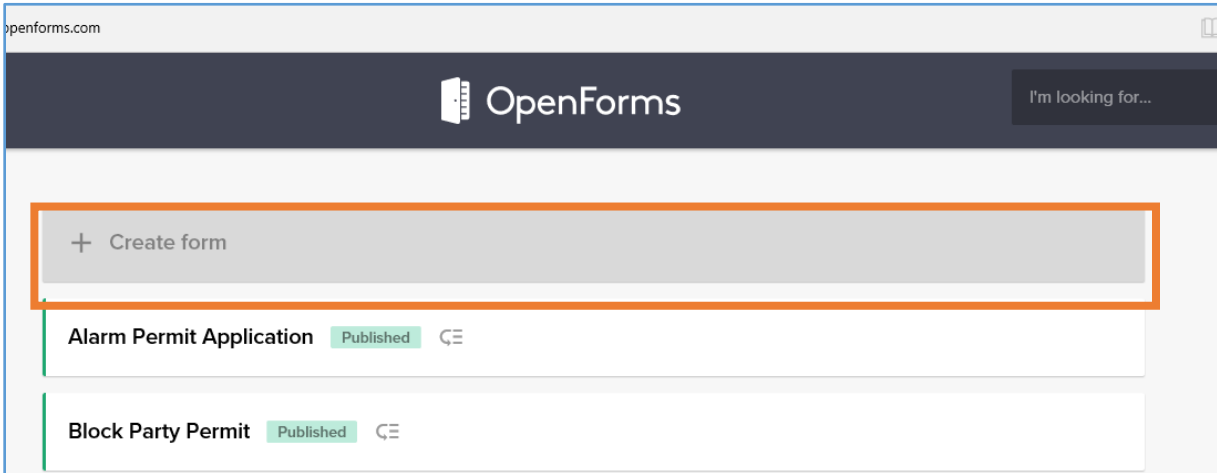


CREATING A NEW FORM

ADDING A NEW FORM

When you sign in, you will see a list of all of the forms created across all City departments. It is important that you edit only forms that you have created.

To create a new form, click **+ CREATE FORM** at the top of the list of forms.



NAMING A NEW FORM

Be sure to give your form a name that makes sense to our customers. When we publish the form to the website, *our customers will see the form name*.

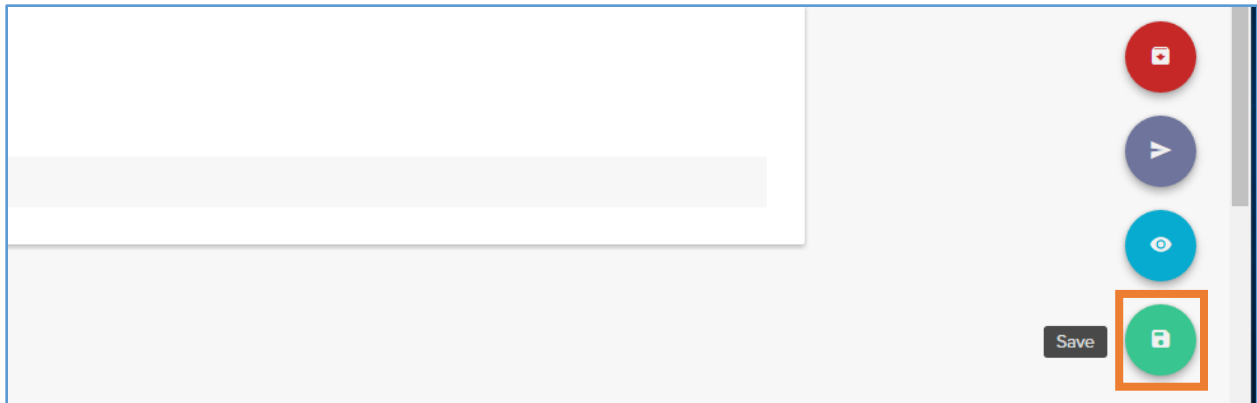
A screenshot of a modal dialog box titled 'Create a new form'. Below the title, it asks 'What do you want to name it?'. A text input field contains the text 'Boards and Commissions Application'. At the bottom of the dialog, there are two buttons: a gray 'Cancel' button and a green 'Create' button.

SAVING A FORM

After creating your form, you will see the form editing page.

Within the editing page, there are a few circular buttons in the bottom-right corner of the screen. See [Saving, Previewing, Publishing, and Archiving](#) for detailed descriptions of these buttons.

The **SAVE ICON** is the green button closest to the bottom of the page. You should use this button *a lot* as you are creating forms.



Note: OpenForms is a software that exists on the internet, not on your computer, so

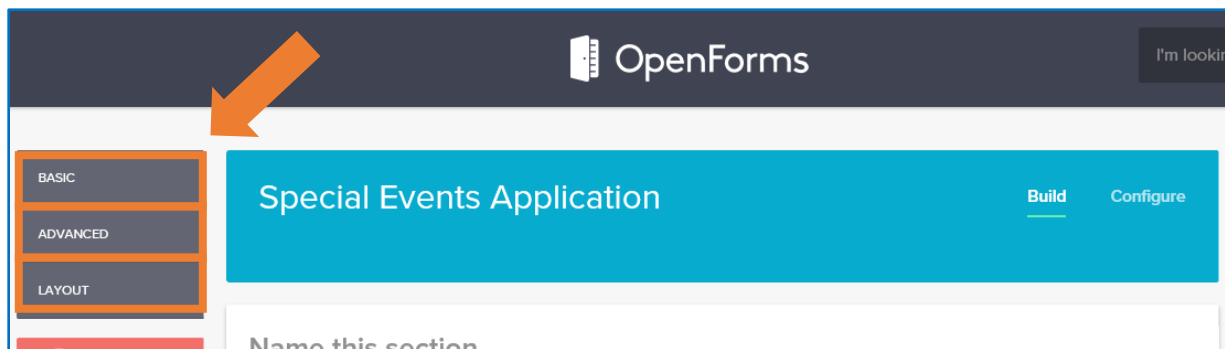
- You need to save often.
- There is no auto-recovery feature in case your computer freezes or crashes.
- The only way to make sure that you don't lose what you work on is to *save* and *save often*.

FORM FIELDS

WHAT ARE FORM FIELDS?







Form fields are any area of an internet form that customers enter text or numbers into. There are different types of form fields to make the data collected easier to analyze and group together. We'll talk more about this in the next section.











Form fields are divided into three categories: **BASIC**, **ADVANCED**, and **LAYOUT**. You can find them on the left side of the page when you are creating or editing a form.



TYPES OF FORM FIELDS

The chart below shows each type of form field and how you should use it.

BASIC		
Icon	Name	Use This When...
 Text	Text Field	There are no predetermined answers. Users can enter whatever they want
 Number	Number Field	Only numbers could possibly be in the answer. Important in forms with calculations (discussed later).
 Dropdown	Dropdown Selection	Customers need to choose <i>only one</i> answer from many possible.
 Checkbox	Checkbox Selection	Customers can select <i>several</i> possible predetermined answers.
 Radio button	Radio Button Selection	Customers can select <i>only one</i> of a few predetermined answers.
 File upload	File Upload	Customers will need to upload an image or document.

 Date	Date Field	Customers need to enter a date (like date of birth or today's date).
 Email	Email Field	When you need to collect email addresses. This will make it easy to mass email customers.
ADVANCED		
Icon	Name	Use This When...
 Calculation	Calculated Field	You need to calculate a number based on numbers a customer previously entered (like total cost after taxes and fees).
 Signature	Signature Field	You need to capture customers' signatures.
 Payment	Payment Field	The customer needs to pay for services.
 Radio matrix	Radio Button Matrix	You need to ask multiple questions with the same predetermined responses and only one answer can be selected. You will almost never use this field type.
 Check matrix	Checkbox Matrix	You need to ask multiple questions with the same predetermined responses and multiple answers can be selected. You will almost never use this field type.
LAYOUT		
Icon	Name	Use This When...
 Section	Add Section	You need to add a new section that will appear as another page.
 Heading	Add Heading	You need to divide a section into subsections.
 Paragraph	Paragraph Text	You need to give the customer detailed instructions/explanation.

 List	List of Text	You want to break down/simplify instructions or explanations.
 Image	Add Image	You want to add a picture to your form for design or instruction reasons.
 Video	Add Video	You want to add a video to your form for design or instruction reasons.

FORM FIELDS BEST PRACTICES

When using form fields, you should always try to give the customer a set of pre-selected possible answers to choose from. This won't always be possible, but a lot of the time it will.

Even if there are many possible answers, it's still a good idea to give customers a list to choose from. For example, the City has over 40 boards and commissions. Consider these points:

- You might think that on an application, we should let the customer type in the name of the board or commission they want to apply for.
- But if the customer misses a capitalization or a space – or if they spell the name wrong – it will take a lot more time to get the data in a format that we can sort in Excel or do any other analysis of.
- A dropdown list with all 40 board names works better in this case.

When you are asking customers to enter text without pre-selected options, it's a good idea to show them in the question or placeholder text how you would like the text entered (see examples below).

Phone Number (Enter Numbers Only, No Hyphens or Spaces)
required

ex) 6164563000

Your Address

Number and Street

required

ex) 300 Monroe Ave NW

City

required

ex) Grand Rapids

State

required

Zip Code

required

ex) 49503

FORM SECTIONS

WHAT ARE FORM SECTIONS?

Form sections break up long forms into more manageable, smaller pages.

Divisions should make sense. For example, an application form could be split into sections:

- Contact Information
- Employment Details
- Application Questions
- Signature Page

ADDING A SECTION

Form sections are a form field type found under the **LAYOUT** section of the form fields navigation bar.

BASIC

ADVANCED

LAYOUT

Section

Heading

Paragraph

List

Image

Video

Special Events Application

[Build](#) [Configure](#)

Name this section

Add field

Clicking **SECTION** will add a new section directly below the last section of the form.

Name this section

Add field

Name this section

Add field

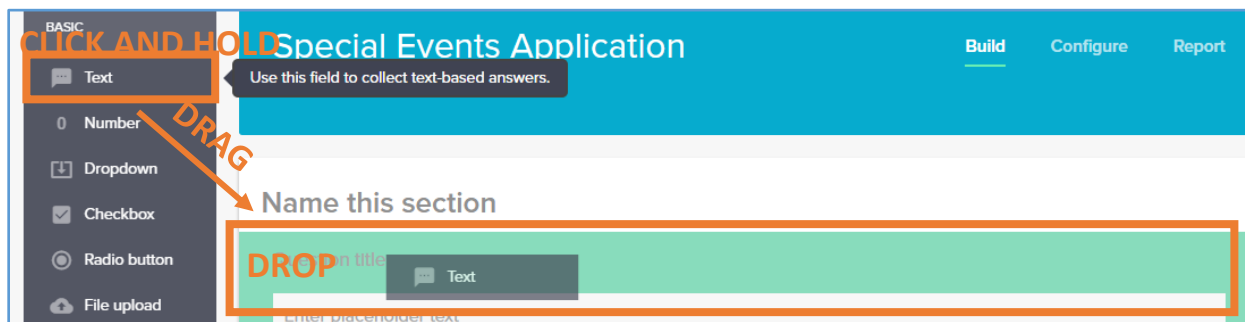
BUILDING FORMS

WHERE TO START

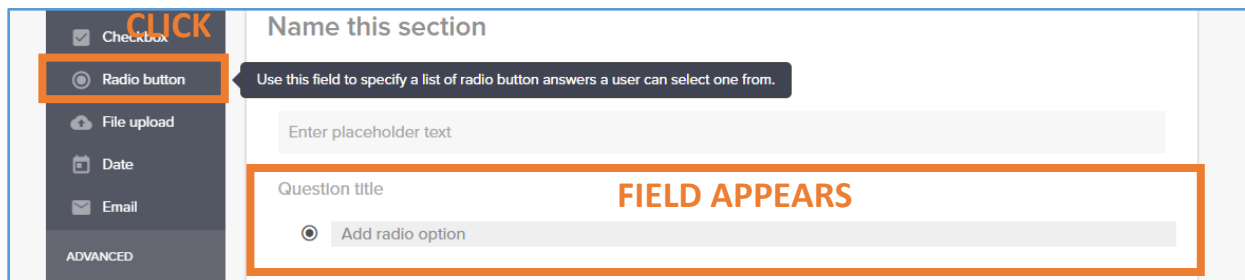
Building online smart forms always starts with good planning. These forms will rarely – likely never – work the same way that your current paper or fillable PDF form works.

ADDING FIELDS

The OpenForms tool is drag-and-drop. This means that you can click and hold any of the form field types on the left-side toolbar and drag that field type to any position on your form. When you release the mouse, the form field you dragged will drop right into place on the form.

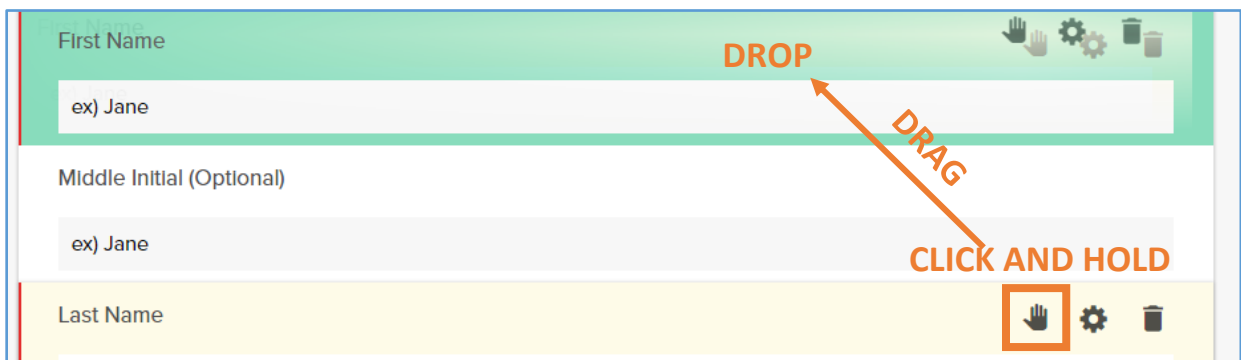


If you just click the form field you want to add, it will be added at the bottom of the form.



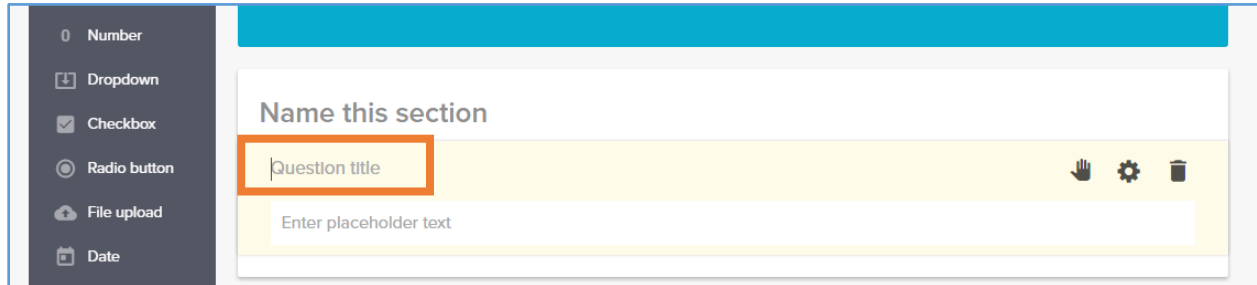
MOVING FIELDS

If you need to rearrange a field, hover over it and find the **HAND ICON**. Click the icon and hold, then drag the field to move it. Release to drop it into place.



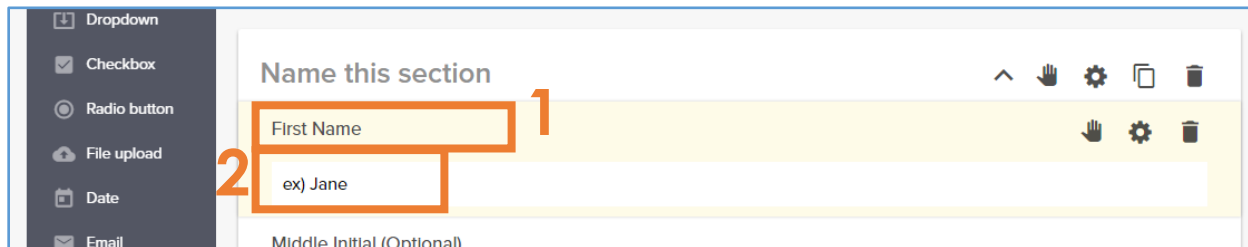
CUSTOMIZING FIELDS

To change the form field title on the form, simply click on the text labeled **QUESTION TITLE**.



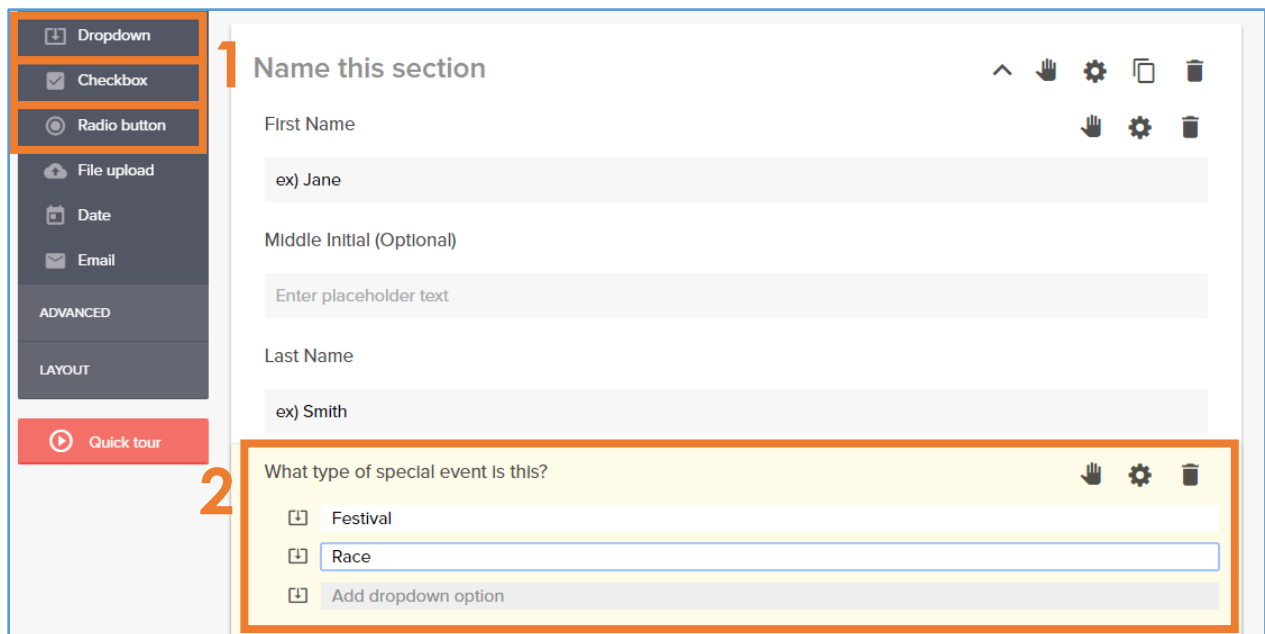
The screenshot shows the form editor interface. On the left is a sidebar with various field types: Number, Dropdown, Checkbox, Radio button, File upload, and Date. The main area displays a form section titled 'Name this section'. Below this title is a yellow box containing the text 'Question title', which is highlighted by an orange rectangle. Below the yellow box is a white box with the placeholder text 'Enter placeholder text'. To the right of the yellow box are three icons: a hand, a gear, and a trash can.

When the cursor appears, you can type your own text to change the **TITLE (1)**. You can change the **PLACEHOLDER TEXT (2)**, too. The placeholder gives customers an example of how they should enter the information you're asking for; it disappears when customers click to enter their own information.



The screenshot shows the form editor interface. On the left is a sidebar with various field types: Dropdown, Checkbox, Radio button, File upload, Date, and Email. The main area displays a form section titled 'Name this section'. Below this title is a yellow box containing the text 'First Name', which is highlighted by an orange rectangle and labeled with a large orange '1'. Below the yellow box is a white box with the placeholder text 'ex) Jane', which is highlighted by an orange rectangle and labeled with a large orange '2'. Below the white box is a light gray box with the placeholder text 'Middle Initial (Optional)'. To the right of the yellow box are three icons: a hand, a gear, and a trash can.

For **DROPDOWN**, **CHECKBOX**, and **RADIO BUTTON (1)** fields, you also need to add all **POSSIBLE SELECTIONS (2)** for the question/prompt you are asking for from the customer.

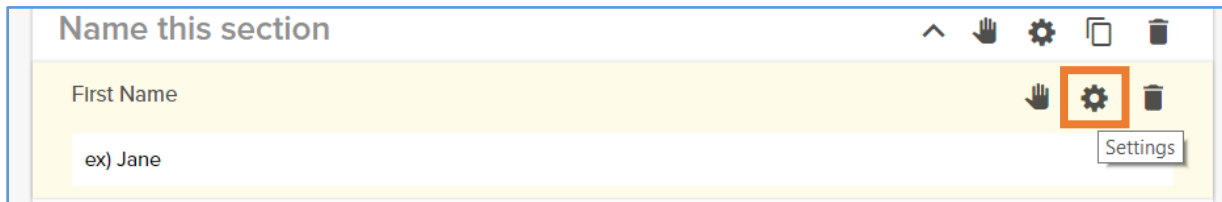


The screenshot shows the form editor interface. On the left is a sidebar with various field types: Dropdown, Checkbox, Radio button, File upload, Date, Email, ADVANCED, and LAYOUT. The main area displays a form section titled 'Name this section'. Below this title is a yellow box containing the text 'First Name', which is highlighted by an orange rectangle and labeled with a large orange '1'. Below the yellow box is a white box with the placeholder text 'ex) Jane', which is highlighted by an orange rectangle and labeled with a large orange '2'. Below the white box is a light gray box with the placeholder text 'Middle Initial (Optional)'. Below the light gray box is a white box with the placeholder text 'Last Name'. Below the white box is a light gray box with the placeholder text 'ex) Smith'. Below the light gray box is a yellow box containing the text 'What type of special event is this?', which is highlighted by an orange rectangle. Below the yellow box is a white box with a dropdown menu showing the options 'Festival', 'Race', and 'Add dropdown option'. To the right of the yellow box are three icons: a hand, a gear, and a trash can.

See [Types of Form Fields](#) for tips on how and when to use specific form fields.

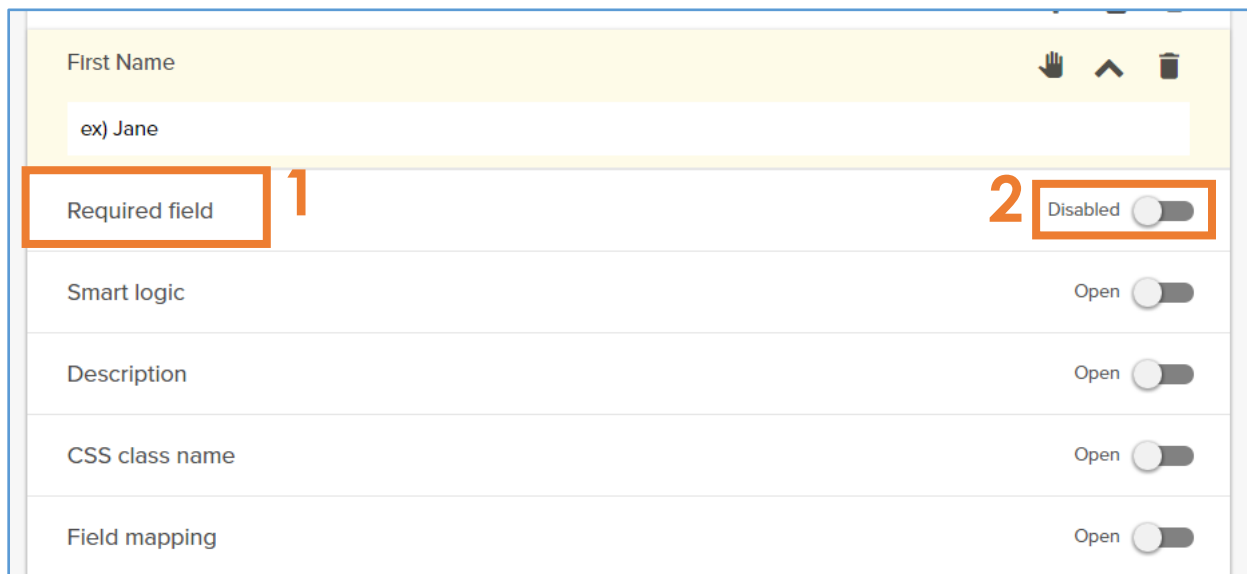
MAKING A FIELD REQUIRED

Hover over the form field you need to make required and click on the **SETTINGS ICON**.



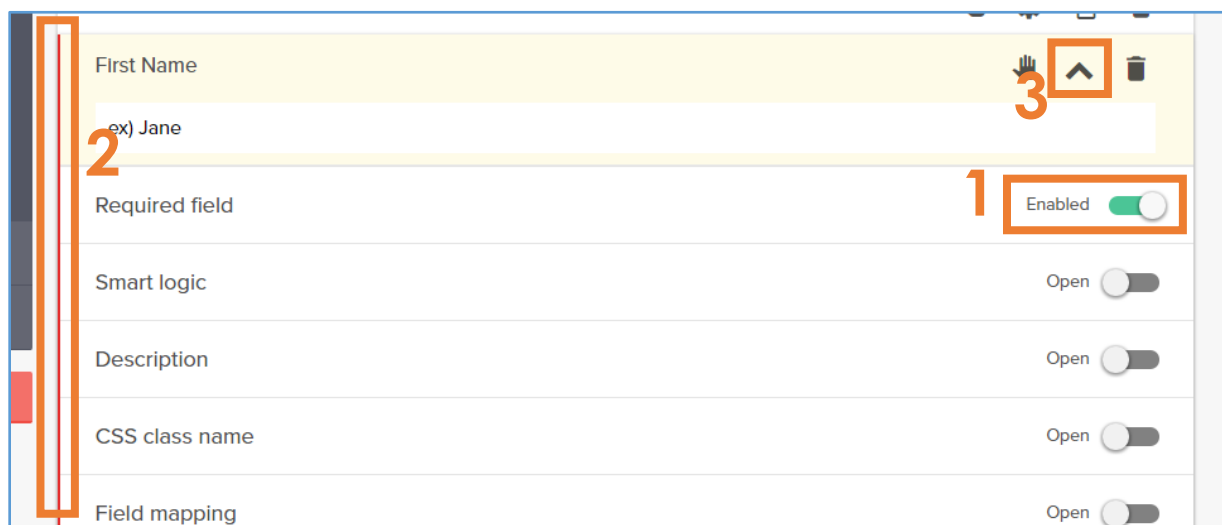
The screenshot shows a form section titled "Name this section". Inside, there is a form field labeled "First Name" with the placeholder text "ex) Jane". To the right of the field, there are three icons: a hand, a gear (the settings icon, which is highlighted with an orange box), and a trash can. A "Settings" tooltip is visible below the gear icon.

From the settings menu that appears below the form field, you will see that the top option is **REQUIRED FIELD (1)**. This will always be disabled by default. Click the **SLIDER BUTTON (2)** to make the field required.



The screenshot shows the settings menu for the "First Name" field. The menu has several options: "Required field", "Smart logic", "Description", "CSS class name", and "Field mapping". The "Required field" option is highlighted with an orange box and labeled with a large orange "1". To its right, there is a "Disabled" label and a slider button, which is also highlighted with an orange box and labeled with a large orange "2". The other options have "Open" labels and slider buttons.

The **SLIDER BUTTON (1)** status will change to enabled, and you will see a **RED LINE (2)** along the side of the field. This indicates that the field is required. You can close the field settings by clicking the **UP-FACING ARROW (3)**.



The screenshot shows the form field "First Name" with the settings menu open. The "Required field" option is now "Enabled", indicated by a green slider button, and is labeled with a large orange "1". A red vertical line appears on the left side of the form field, labeled with a large orange "2". The settings menu is closed, and the up-facing arrow icon is highlighted with an orange box and labeled with a large orange "3".

USING SMART LOGIC

Smart logic is a difficult concept. Sometimes we only need to ask a customer a specific question if they gave a specific answer to a previous question.

Here's an example based on a Special Events form:

- We need to know if an event will last all day.
- If an event lasts all day, then we have all the information we need, but
- If an event does not last all day, then we need to know what time the event will start and when it will end.

So, below the **RADIO BUTTON FIELD (1)** asking if the event is all day, we add a **TEXT FIELD (2)** asking when the event will start and end. We only need to ask for the start and end times, though, if the customer answers no to the first question.

Is this an all day event?

☐ Yes

☐ No

When will the event start and end? (12:00 pm - 8:00 pm)

12:00 pm - 8:00 pm

To do this, first we click the **SETTINGS ICON** on the start and end time question.

When will the event start and end? (12:00 pm - 8:00 pm)

12:00 pm - 8:00 pm

Settings

Then we find **DISPLAY LOGIC (1)** and click the **SLIDER BUTTON (2)** to open this setting.

Now we see the **SMART LOGIC SETTINGS (1)**. You will see a dropdown menu with **SHOW (2)** automatically selected. You will always use the show setting, so don't worry about changing this.

Now we need to click **ADD SCENARIO**.

A box labeled **1ST SCENARIO (1)** will appear. We need to **ADD A RULE (2)** to make our smart logic work.

Think of this as a logic statement: we only want to show this question if the customer answers no to the all-day event question.

So, we select the **SECTION (1)** that the all-day event question is in, then we select the **CONTROL (2)** – which is the all-day event question. Finally, we set the **ANSWER (3)** to the question that will trigger this question to show – in this case, “no”.

Think of it this way: our statement now reads, “*ONLY SHOW* this question *IF* the answer to the all-day event question *IS NO*.”

If you realize that you made a mistake in your rule, delete it from the current rules box by clicking the **DELETE ICON** and start over.

When your rule looks right, click **ADD (1)** and make sure that your rule appears in the **CURRENT RULES (2)**, then click **SAVE (3)**. (You *must* click add before clicking save, or your logic will not work.)

TESTING SMART LOGIC

You should always test your logic to make sure that it is working. First, click **PREVIEW** in the bottom-right corner.

Next, find the question your rule is tied to and try answering *both ways* to make sure it is working.

In our example, the screenshots below show that our rule is working. When the answer to the all-day event question is yes, the question *doesn't* show. When the answer is no, the question *does* show.

Is this an all day event?

☒ Yes

☐ No

Back Save Submit

Is this an all day event?

☐ Yes

☒ No

When will the event start and end? (12:00 pm - 8:00 pm)

12:00 pm - 8:00 pm

Back Save Submit

Questions?

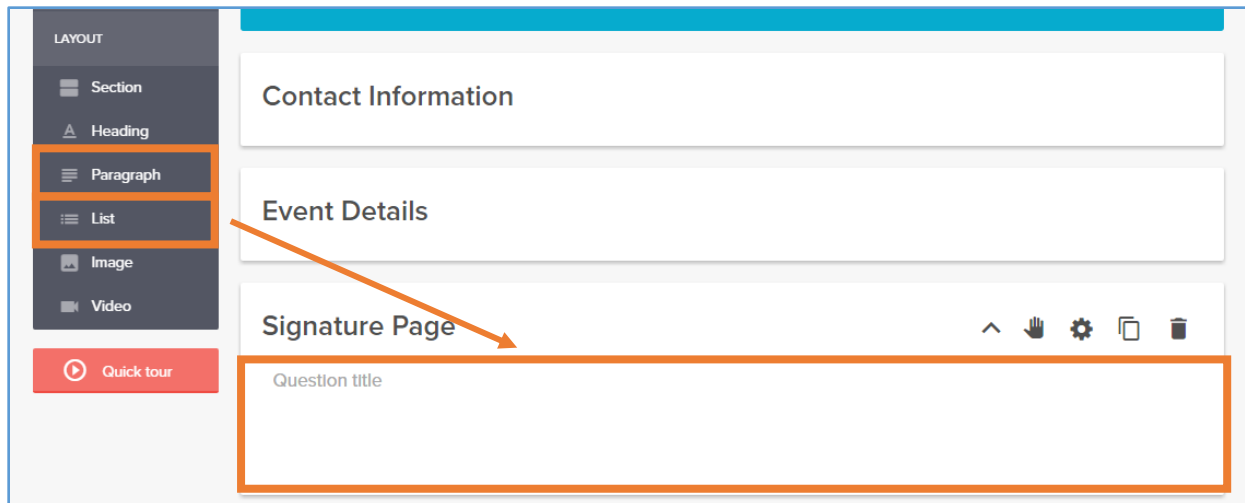
Smart logic can be confusing, and we are here to help. Contact the GR Digital Team.

USING SIGNATURE FIELDS

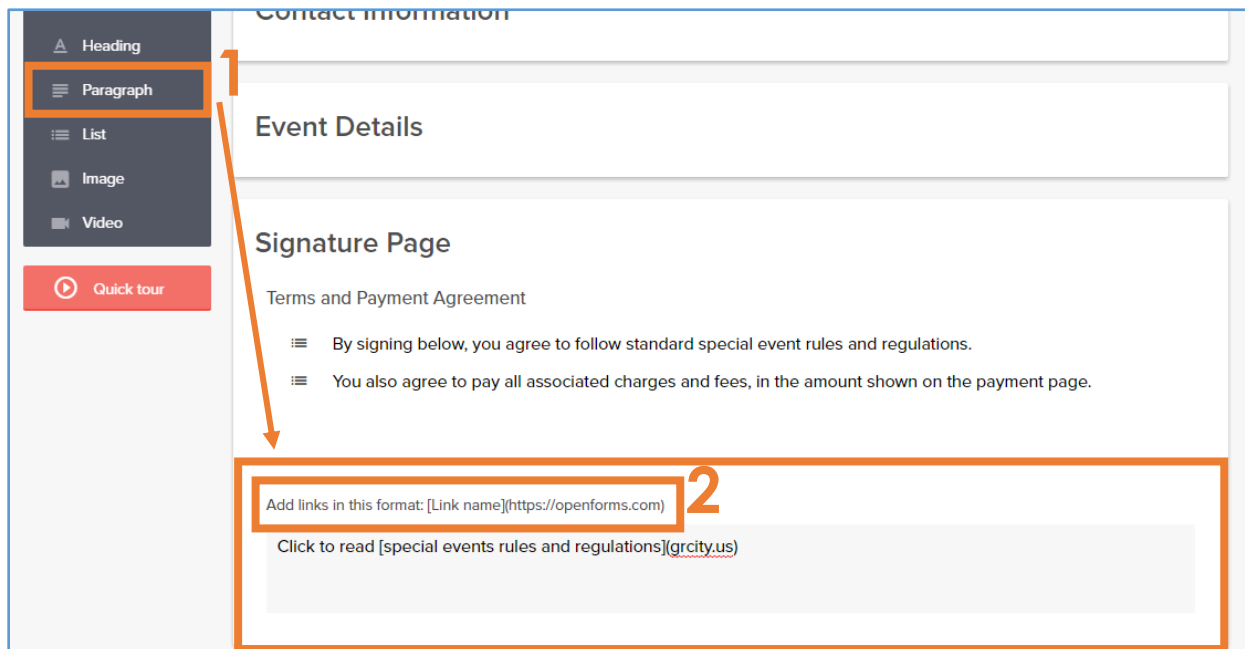
OpenForms allows customers to sign forms indicating agreement to the terms of your service/transaction. The customer signs using either their mouse/cursor on a computer or their finger on a touchscreen device.

These signatures are widely accepted as valid under Michigan law. If you are questioning whether your service type can accept these electronic signatures, contact the GR Digital Team for guidance.

Create a signature page section and add a **PARAGRAPH** or **LIST** field to enter the terms and charges the customer is agreeing to follow and pay.



Enter the terms of the agreement and payment. The list field is useful here because you can separate each part of the agreement into more readable pieces. It's a good idea to include a **PARAGRAPH FIELD (1)** with a link to your service/transaction's standard terms so that the customer can review these before signing. The paragraph field includes **INSTRUCTIONS (2)** for adding hyperlinks.



Now it is time to add the **SIGNATURE FIELD** to collect the customer's signature. Change the question title to *Sign Below*.

Signature

Payment

Radio matrix

Check matrix

LAYOUT

Quick tour

Contact Information

Event Details

Signature Page

Terms and Payment Agreement

By signing below, you agree to follow standard special event rules and regulations.

You also agree to pay all associated charges and fees, in the amount shown on the payment page.

Add links in this format: [Link name](https://openforms.com)

Click to read [special events rules and regulations](grcity.us)

Sign Below

OR

This is what customers see when they get to this section.

Special Events Application

My Progress: 67%

Signature Page

Terms and Payment Agreement

By signing below, you agree to follow standard special event rules and regulations.

You also agree to pay all associated charges and fees, in the amount shown on the payment page.

Click to read [special events rules and regulations](#)

Sign Below

Sign below using your mouse or upload a signature file from your computer:

OR

USING CALCULATED AND PAYMENT FIELDS

Some services require payments. OpenForms has the ability to calculate total costs based on either number fields that the customer has completed or flat costs for a service. Calculated fields can also add taxes and/or fees. If your service requires payment, this should be the last section of your form.

Add a new **SECTION** and title it *Payment*.

The screenshot shows the OpenForms editor interface. On the left, a sidebar menu is open with the 'Section' option selected. Below it are options for 'Heading', 'Paragraph', 'List', 'Image', and 'Video'. A red 'Quick tour' button is also visible. The main form area displays a sequence of sections: 'Contact Information', 'Event Details', 'Signature Page', and a newly added 'Payment' section. The 'Payment' section is highlighted with an orange border and contains a dashed box with the text 'Add field'.

Some services have a fixed rate with no variation based on customer choices. For example, some services only need a **PAYMENT FIELD** to charge the customer the fixed price of a service/transaction.

The screenshot shows the 'Payment' field configuration screen. The left sidebar menu is open with the 'Payment' option selected. Below it are options for 'Radio matrix' and 'Check matrix', and a 'LAYOUT' section. A red 'Quick tour' button is also visible. The main form area displays a sequence of sections: 'Event Details', 'Signature Page', and a 'Payment' section. The 'Payment' section is highlighted with an orange border and contains a 'Question title' field, a text input field for 'Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:', and a dropdown menu for 'Reference calculator field'. A warning message at the top states: 'Accept payments from users. There can only be one payment field per form.'

Change the **QUESTION TITLE (1)** and **COST (2)** in the payment field.

The screenshot shows the 'Charges and Fees' payment field configuration. The left sidebar menu is open with the 'Payment' option selected. Below it are options for 'Radio matrix' and 'Check matrix', and a 'LAYOUT' section. A red 'Quick tour' button is also visible. The main form area displays a sequence of sections: 'Event Details', 'Signature Page', and a 'Payment' section. The 'Payment' section is highlighted with an orange border and contains a 'Question title' field, a text input field for 'Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:', and a dropdown menu for 'Reference calculator field'. A warning message at the top states: 'Accept payments from users. There can only be one payment field per form.'

Other services will have several possible charges based on options that the customer chooses. In this case, you will need to add a **CALCULATION FIELD** in addition to a payment field.

Take this example: we are using a made up formula for calculating the cost of a special event. We will use the length of the event (number of hours) multiplied by a standard rate per hour. Insert the *How long is your event?* Field using the **SELECT A VALUE INPUT (1)**. Click **INSERT (2)** to add this to the Formula.

Now, in this example, we multiply the number of hours that the customer enters by the cost per hour in the **FORMULA** field. For this example, we will use a rate of \$50 per hour.

Total Charges

Build a formula by inserting existing values from the drop-down below and then typing in any mathematical operations and numbers. Create new custom values based on a field above, such as radio buttons, checkboxes or drop-downs, so that you can assign numerical values to a textual option.

Formula:

[How long is your event?]*50

Select an existing value:

-- Select a value -- Edit Insert

Add custom value based on a field

Add

Next, select the **REFERENCE CALCULATOR FIELD** from the dropdown menu in the payment field below the calculated field. Now the customer is charged what is calculated from their selections in the form.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field

Total Charges

In this final step for accepting payment, we connect the City's payment gateway to the form. Without this step your form can't actually accept payment. Your form **WILL NOT ALLOW YOU TO SAVE** without connecting the gateway.

Payment

Select a payment gateway in the settings for this field.

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges

First, click on the **SETTINGS ICON** for the payment field.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges

Settings

Click the **OPEN SLIDER BUTTON** on the Select credit card gateway settings item.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$
00.00

OR

Reference calculator field

Total Charges

Smart logic
Open

Description
Open

CSS class name
Open

Select credit card gateway
Open

Select the City's payment gateway from the **DROPDOWN MENU**. After you save your form, it's now complete and ready to accept payment for your service/transaction!

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$
00.00

OR

Reference calculator field

Total Charges

Smart logic
Open

Description
Open

CSS class name
Open

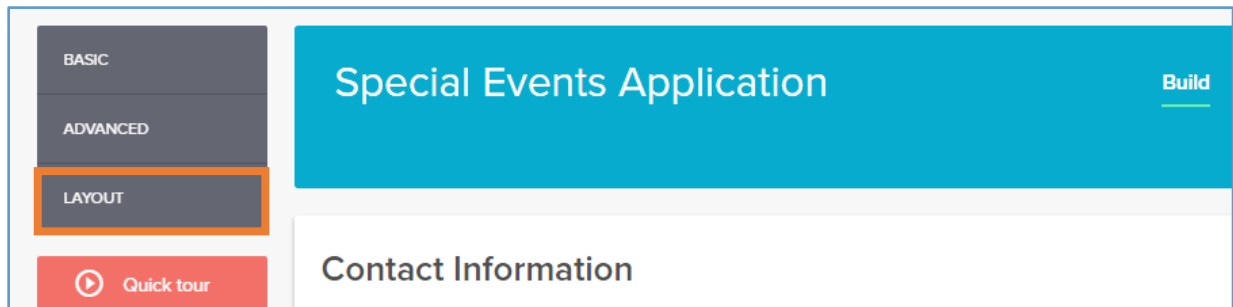
Select credit card gateway
Close

ADDING FORMATTING FIELDS

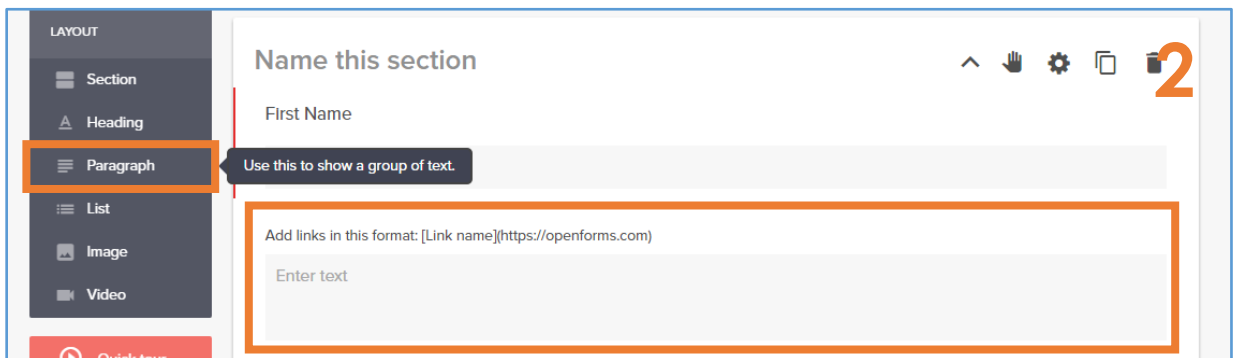
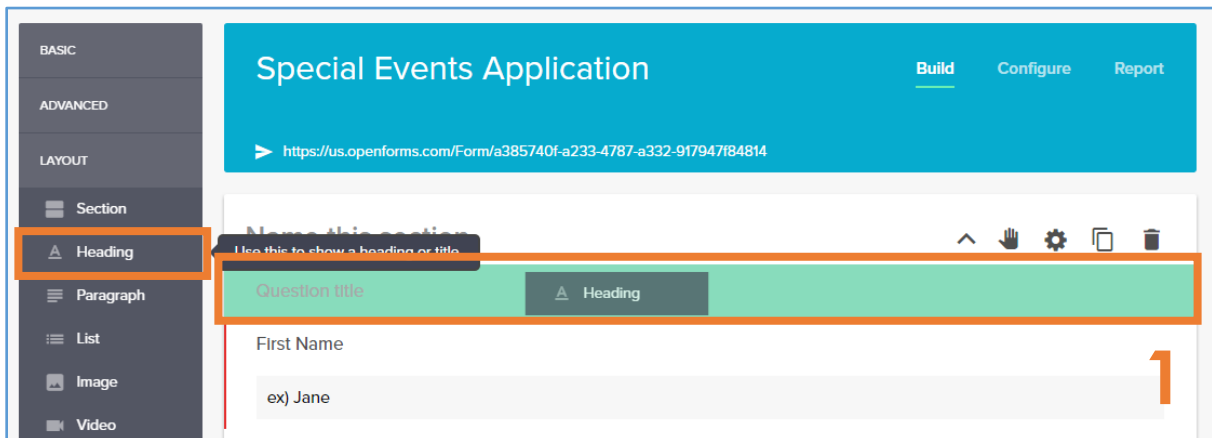
Formatting Fields are areas of the form that a customer does not directly respond to.

The best example of a formatting Field is written instructions that provide information to the customer but do not need a response.

Sections are formatting elements, too, but we've already covered those. You can find formatting elements under the **LAYOUT** section of the left-side toolbar.

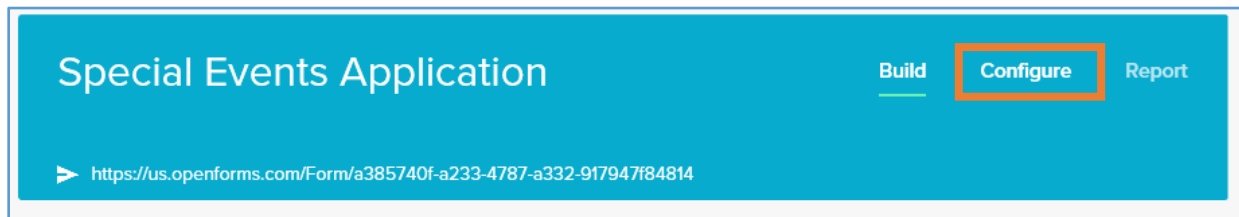


You add formatting elements the same way you add form fields: either **1. DRAG AND DROP** into the position you want them or **2. CLICK THE ICON** in the left-hand toolbar to add your selection to the bottom of the form.

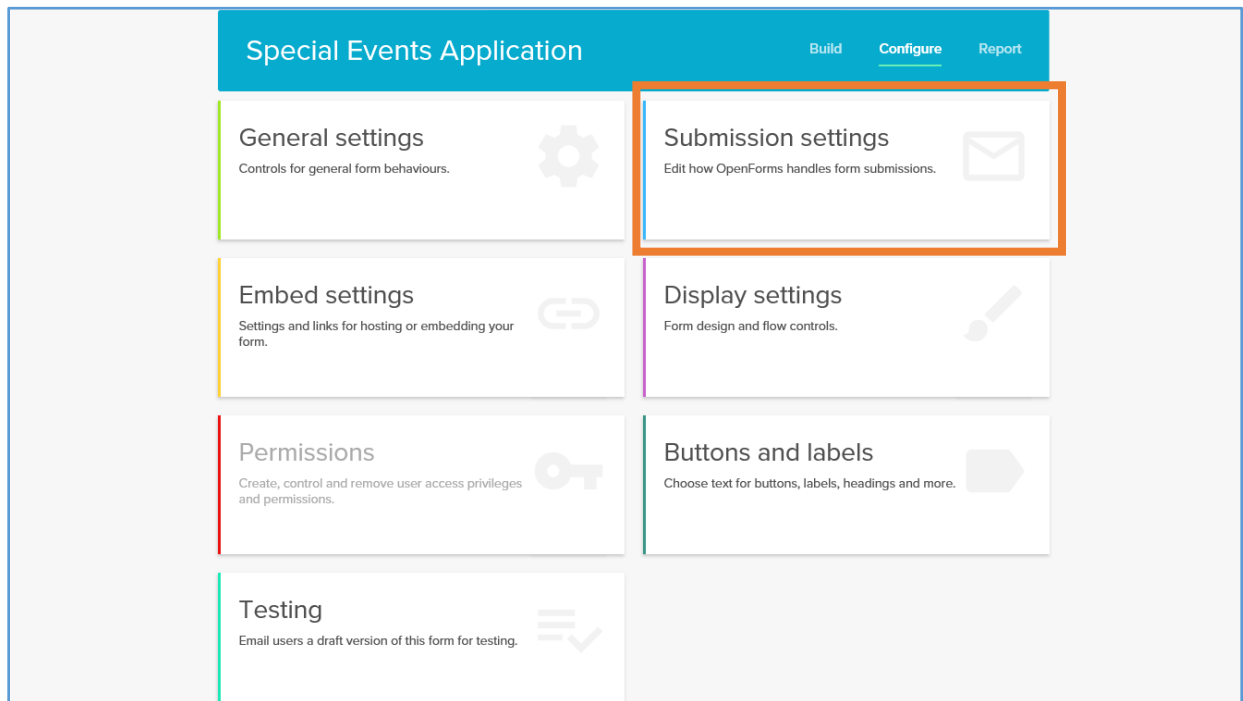


ADDING A SUBMISSION CONFIRMATION MESSAGE

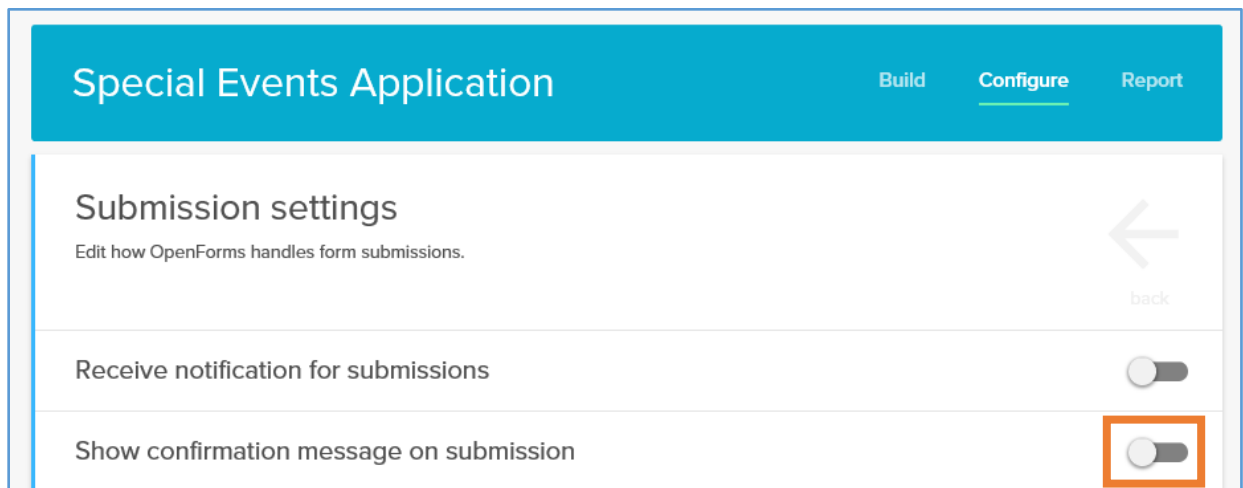
To add a confirmation message, click **CONFIGURE** at the top right of your form title header to access the settings.



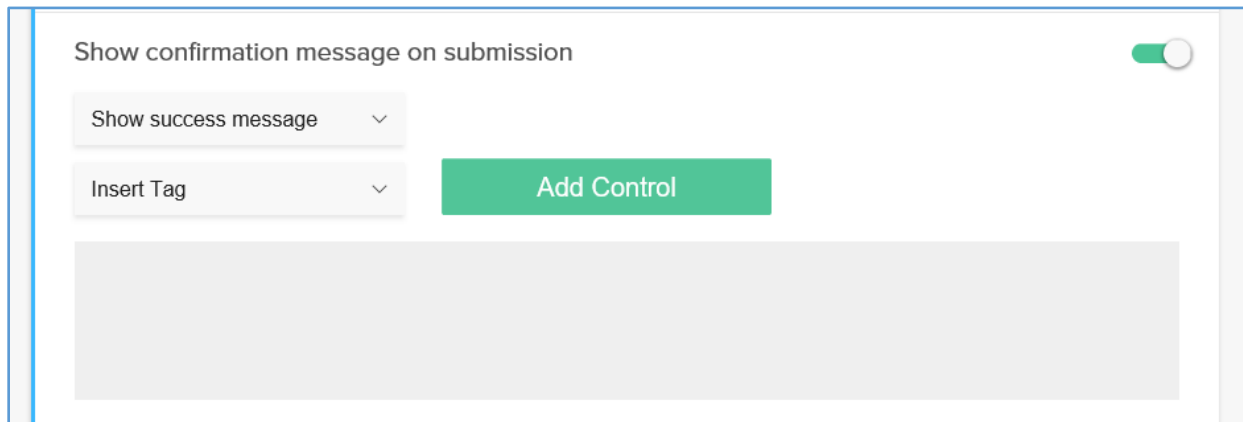
Click **SUBMISSION SETTINGS** from the form settings categories.



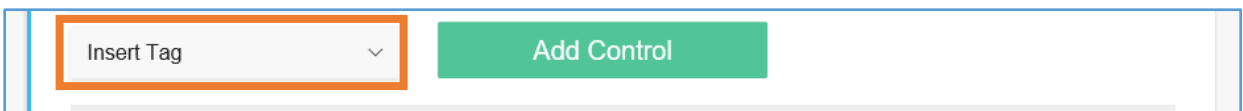
Click the **SLIDER BUTTON** next to the Show confirmation message on submission menu item.



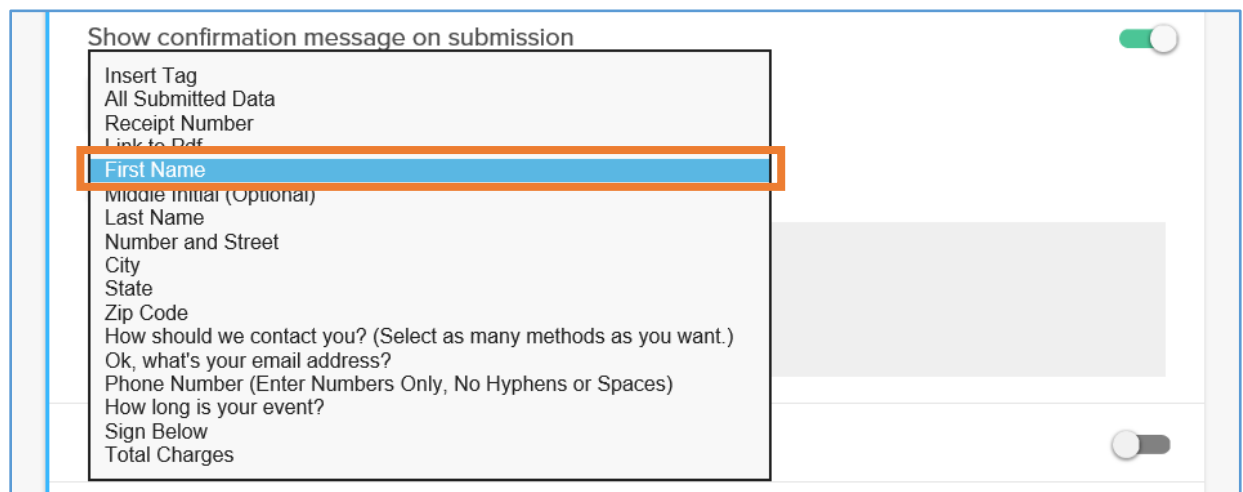
Using this setting, you can setup a message to display to customers every time they submit a completed form. You can even personalize the message to include their name if you collect it in the form. (See below.)



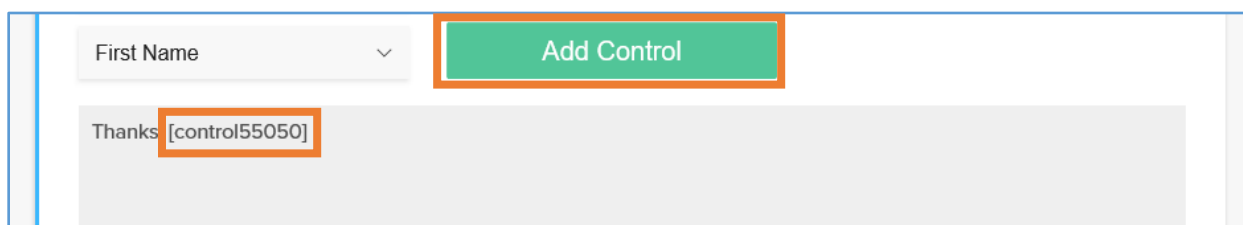
To include a field that the customer entered in the message, like first name, use the **INSERT TAG** dropdown menu.



Choose the appropriate **FIELD** from the dropdown Menu.



Click **ADD CONTROL**, and the **FIELD CONTROL** will appear in your message text.



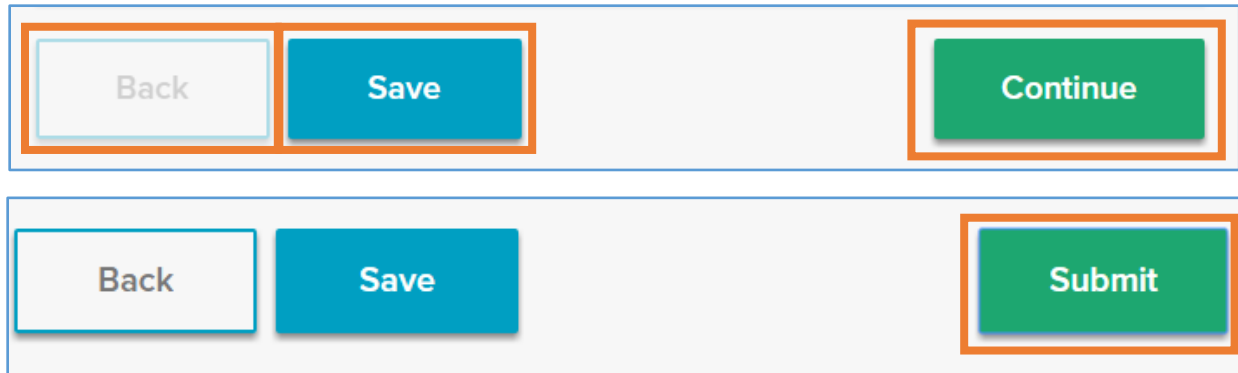
Finish typing your message. Now when customers submit their forms, they will see your message!

Submission Complete

Thanks, Zac! We got your submission. We'll contact you with more information and status updates.

EDITING BUTTON LABELS

OpenForms allows form creators to change the labels on the buttons that allow users to go **BACK** to a previous section, **SAVE** their progress and email the saved form to themselves to complete later, **CONTINUE** to the next session, or **SUBMIT** their completed form.



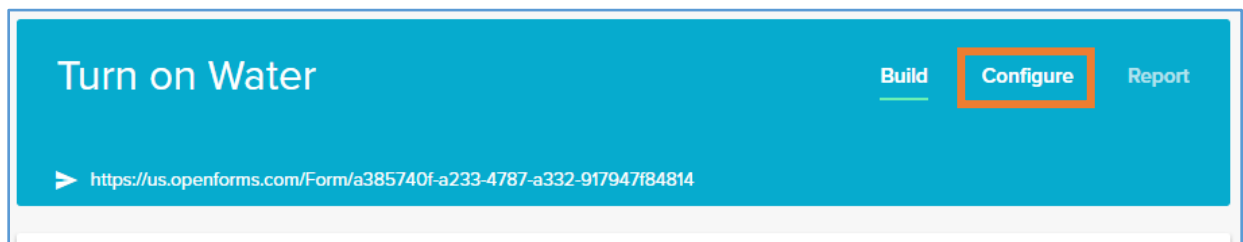
Changing button labels is useful for forms that need to be routed to multiple people to complete separate sections before they can be submitted to the City. Here is a goofy example: to start water at a rental property that a tenant is responsible for, the City needs information from both the tenant *and* the landlord.

In basic forms, the save button is best used for customers to send a link to themselves so that they can return to their partially completed form to finish it at a later time.

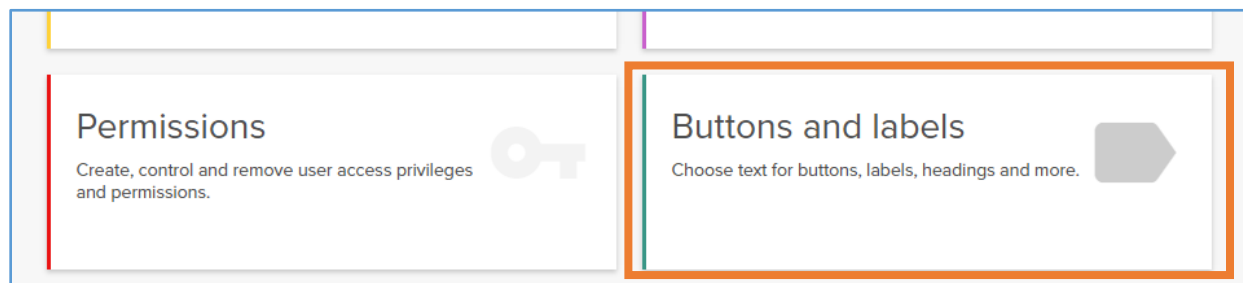
In these more complex forms that truly have multiple parties responsible for separate sections, the save button is better used to route the form to those other parties.

To make this clear, it is best to change the save button label.

To change button labels, click **CONFIGURE** at the top-right of your form title heading.



Next, click the **BUTTONS AND LABELS** section in the configure menu.



To change the button labels, click the **SLIDER** to the right of the **EDIT BUTTONS** menu item.

Turn on Water

Build Configure Report

Buttons and labels

Choose text for buttons, labels, headings and more.

Edit buttons

back

Find the **SAVE PROGRESS BUTTON TEXT** section.

Buttons and labels

Choose text for buttons, labels, headings and more.

back

Edit buttons

Next button text

Continue

Previous button text

Back

Submit button text

Submit

Save progress button text

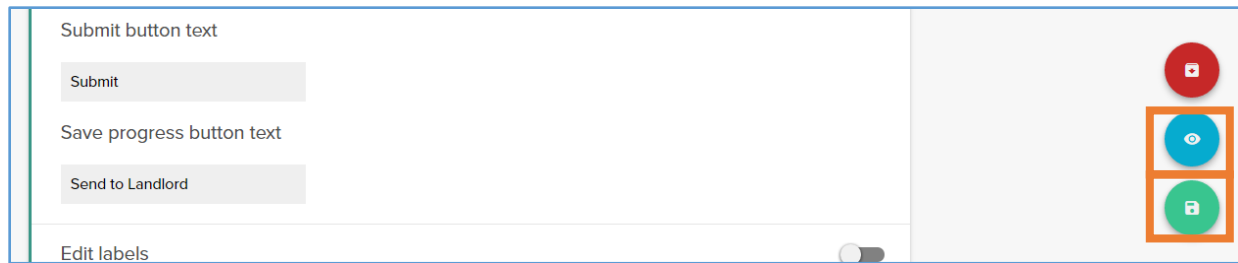
Save

Change the **TEXT** to make it clear to the customer that the form will be sent to someone else to be completed. In this case, we change the text to *Send to Landlord*.

Save progress button text

Send to Landlord

Click **SAVE**, then click **PREVIEW**.



Submit button text

Submit


Save progress button text

Send to Landlord

Edit labels

The screenshot shows a settings panel with a left sidebar and a main content area. The sidebar contains labels for 'Submit button text', 'Save progress button text', and 'Edit labels'. The main content area shows a 'Submit' button and a 'Send to Landlord' button. On the right side of the panel, there is a vertical stack of three circular icons: a red one at the top, a blue one in the middle, and a green one at the bottom. The blue and green icons are grouped together by an orange rectangular box.

The **BUTTON** in the preview should now read *Send to Landlord*.



Back Send to Landlord Continue

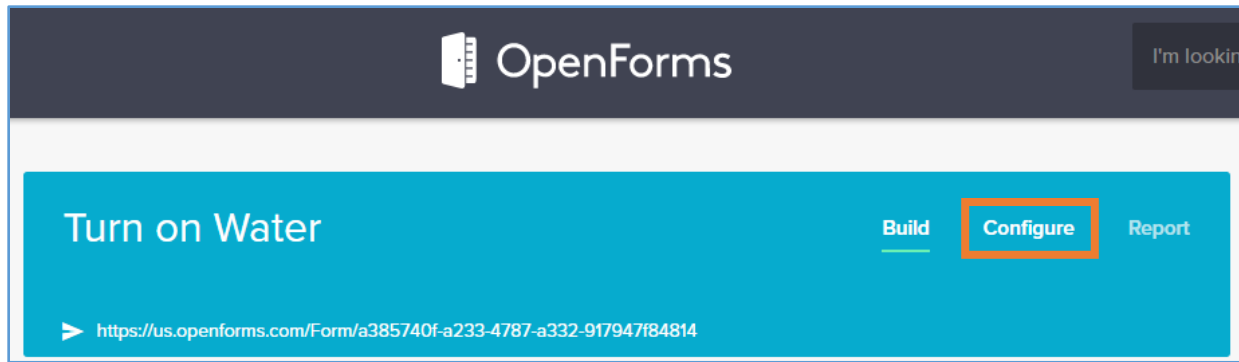
The screenshot shows a horizontal bar with three buttons. The first button is light blue and labeled 'Back'. The second button is blue and labeled 'Send to Landlord', and it is highlighted with an orange rectangular border. The third button is green and labeled 'Continue'.

If you click the button, though, you will notice that the dialog box that opens and asks for an email input still reads as though this were a save button. This leads into the next section of this manual, **EDIT 'SAVE PROGRESS' POPUP**.

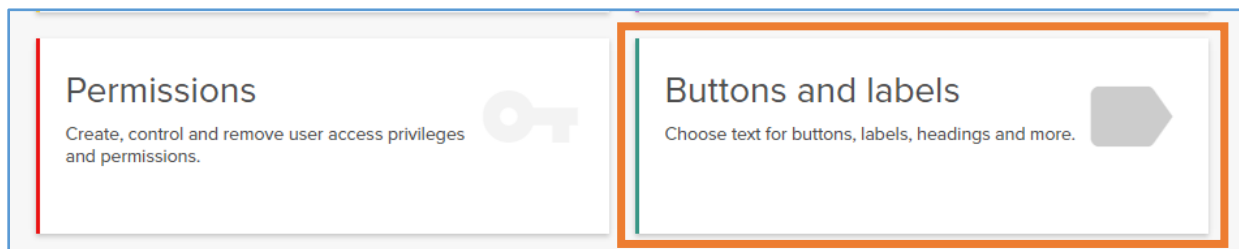
EDITING THE 'SAVE PROGRESS' POPUP

In the previous section, we talked about the advantages of changing the save button text in certain form scenarios. When we do this, though, we also need to change the popup that asks for email input from the user to reflect the purpose of the button change.

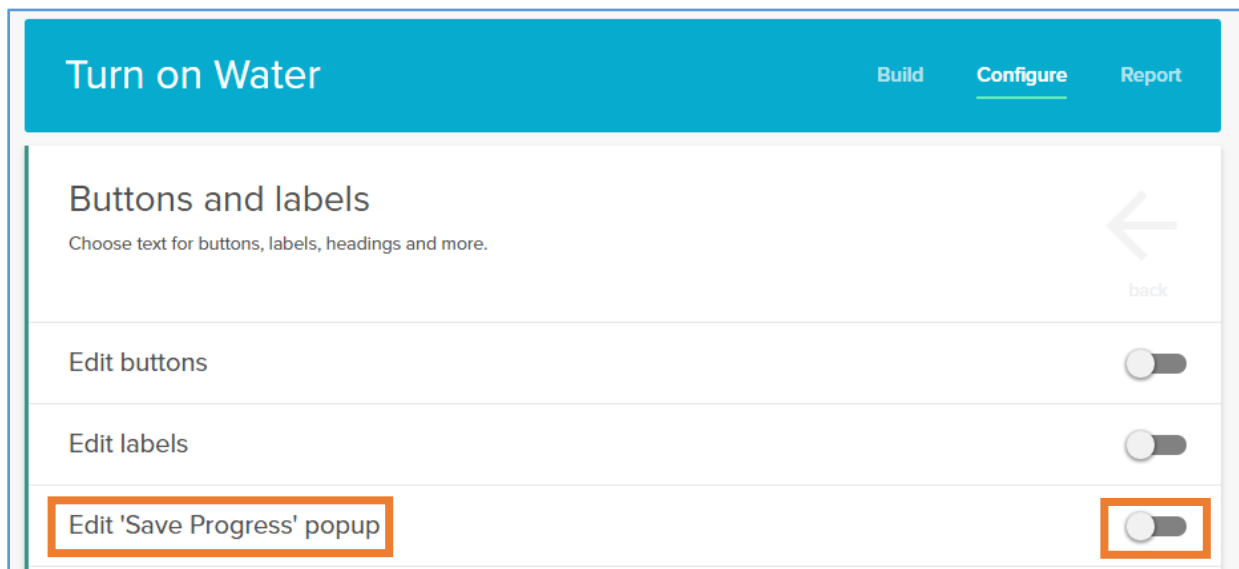
Edit your form and click **CONFIGURE** at the top right of your form title header.



Access the **BUTTONS AND LABELS** settings.



Find the **EDIT 'SAVE PROGRESS' POPUP** settings menu item and click the **SLIDER BUTTON** to the right.



You will need to edit most – maybe even all – of the **FIELDS** in this section so that they make sense for your situation. Reference the two images below to see which field changes which piece of the popup the customer sees in the form.

Popup heading	1
We've saved your progress	
Return link label	2
Save this link to return later:	
Email address field	3
Email it to me:	
Cancel button	4
Cancel	
Email me button	5
Email link	
Email success heading	6
Success!	
Email success text	7
Your form return link has been en	
Email success button	8
OK	


We've saved your progress ¹

² Save this link to return later:
<https://us.openforms.com/FormResponse/5a76b633-bff7-4a8a-8428-214e769dd77c>

Email it to me: ³

john@email.com

⁴ ⁵



⁶ **Success!**

Your form return link has been emailed to you

⁸

After making updates, the customer will see this:


You're done!

**We just need some info from
your landlord.**

We'll send this link to your landlord:
<https://us.openforms.com/FormResponse/2fd924eb-39d9-4e60-86e2-a7c56a8cba48>

Enter your landlord's email below

john@email.com



Success!

The form has been sent to your landlord!

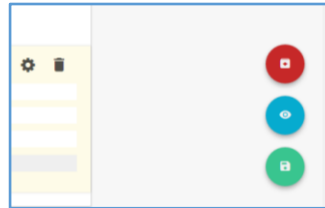
SAVING, PREVIEWING, PUBLISHING, AND ARCHIVING

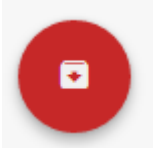
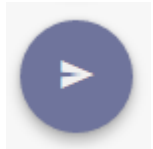
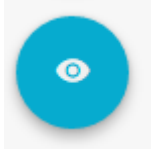
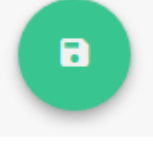
When creating a new form, there will be four buttons at the bottom-right of your screen. When editing a form that is already published, there will be three.

NEW FORM



EXISTING FORM

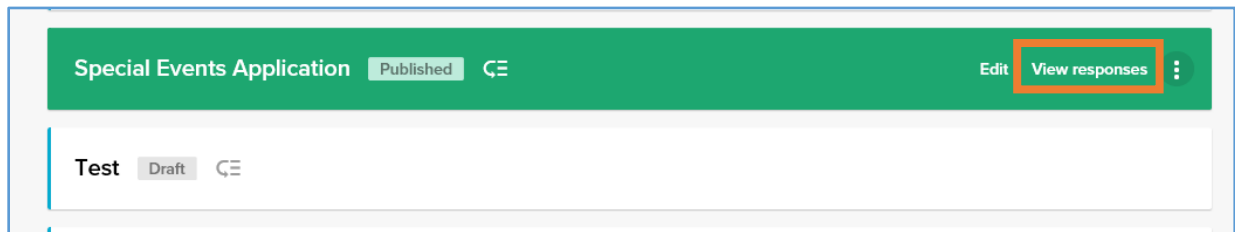


FORMS MANAGEMENT BUTTONS		
Button	Button Name	Use This When...
	Archive	You want to delete forms. You should archive forms, not <i>actually delete</i> forms. Think of this as <i>retiring</i> the form: when you will no longer use a form on the website, archive it.
	Publish	You are done creating a form and need to add it to the website. Until you press publish, the public can't see your form. The GR Digital Team is responsible for publishing all completed forms.
	Preview	You want to see what your form will look like to your customers. You can use this for both unpublished forms and published forms that you are editing.
	Save	You need to save changes you made to your form. You should use this button constantly. If your computer crashes and you haven't saved, you will lose all of your work. <i>Save often.</i>

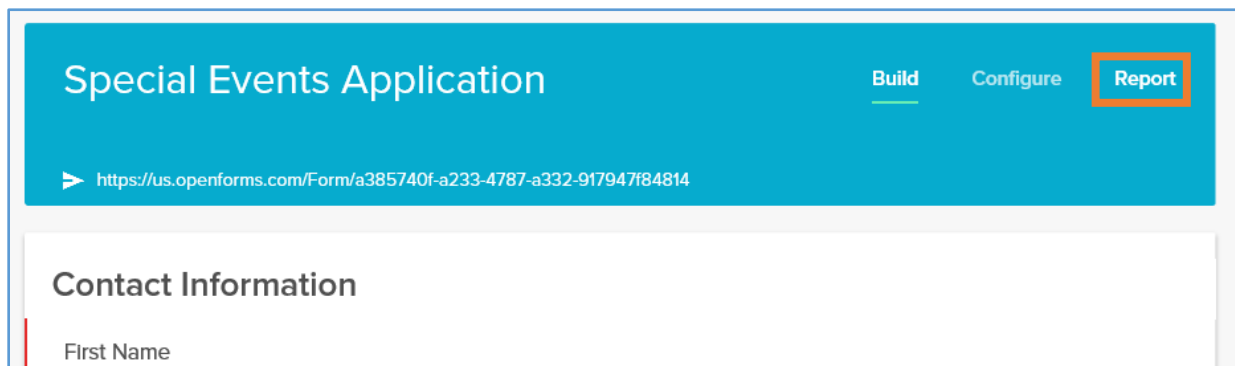
FORMS RESULTS

After you've published your form and linked to it on or embedded it in your webpage, customers will start using it. For some forms, you can change the settings to [Receive Notification for Submissions](#). For forms that will get a high volume of responses, this is not practical.

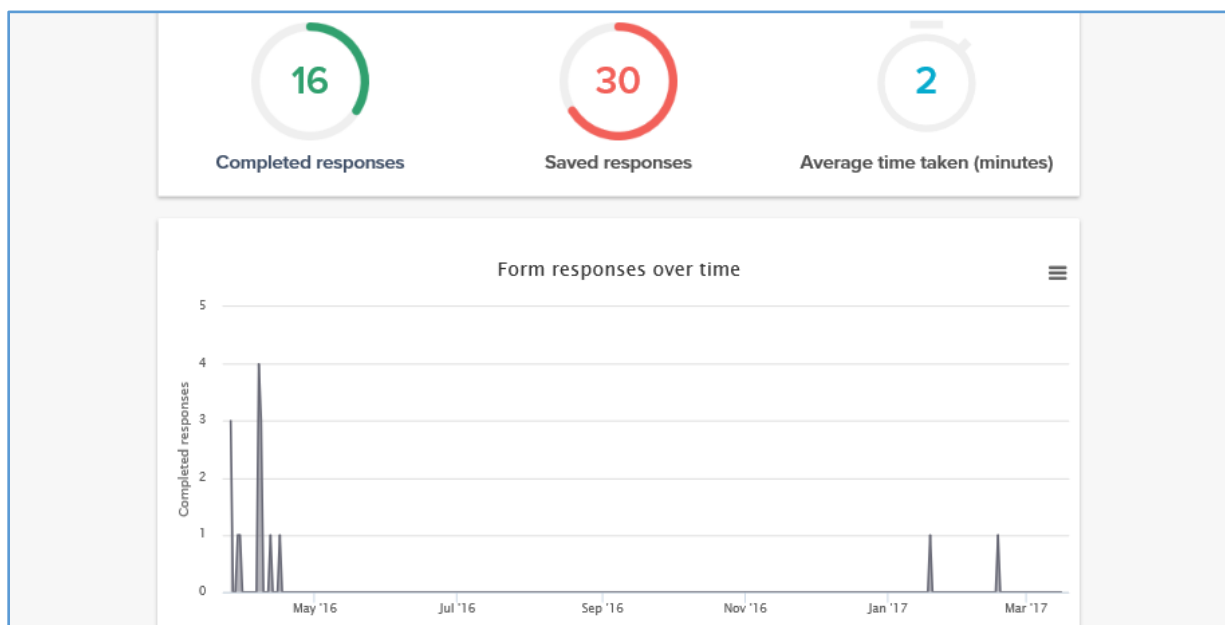
There are two ways to access a form's results. The fastest way is to log in, find the form in the form library, and click **VIEW RESPONSES**.



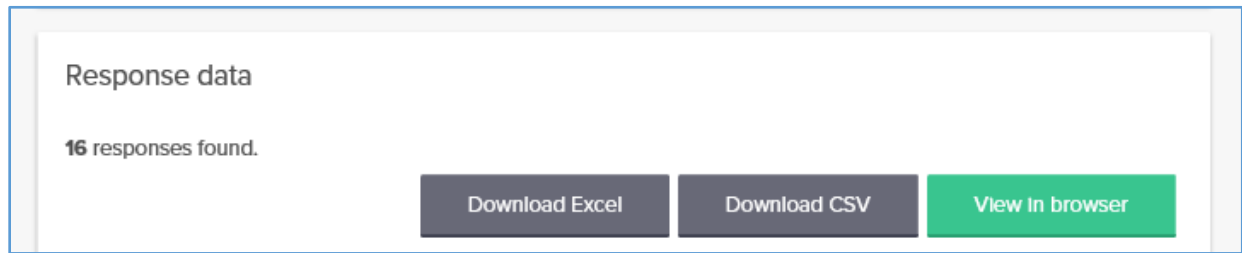
You can also access the results from within the form editor. Just click on **REPORT** from the form title header.



This takes you to an overview of customer submissions over time.



To export or view all of the form's results. Scroll to the bottom of the page and select one of the options: **DOWNLOAD EXCEL**, **DOWNLOAD CSV**, or **VIEW IN BROWSER**.



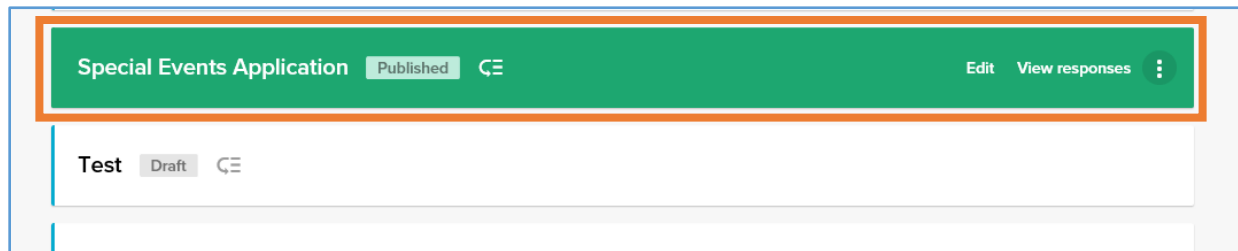
Now you have all of your customers' information, and you can do any work necessary to process applications, transactions, service requests, etc.

FORMS SETTINGS

All users with permissions to create forms have access to at least some of the Forms Settings. This section details each of the settings areas and the functions available within each of them. Only administrators have access to all of these settings, but every OpenForms user will have some access.

ACCESSING FORM SETTINGS

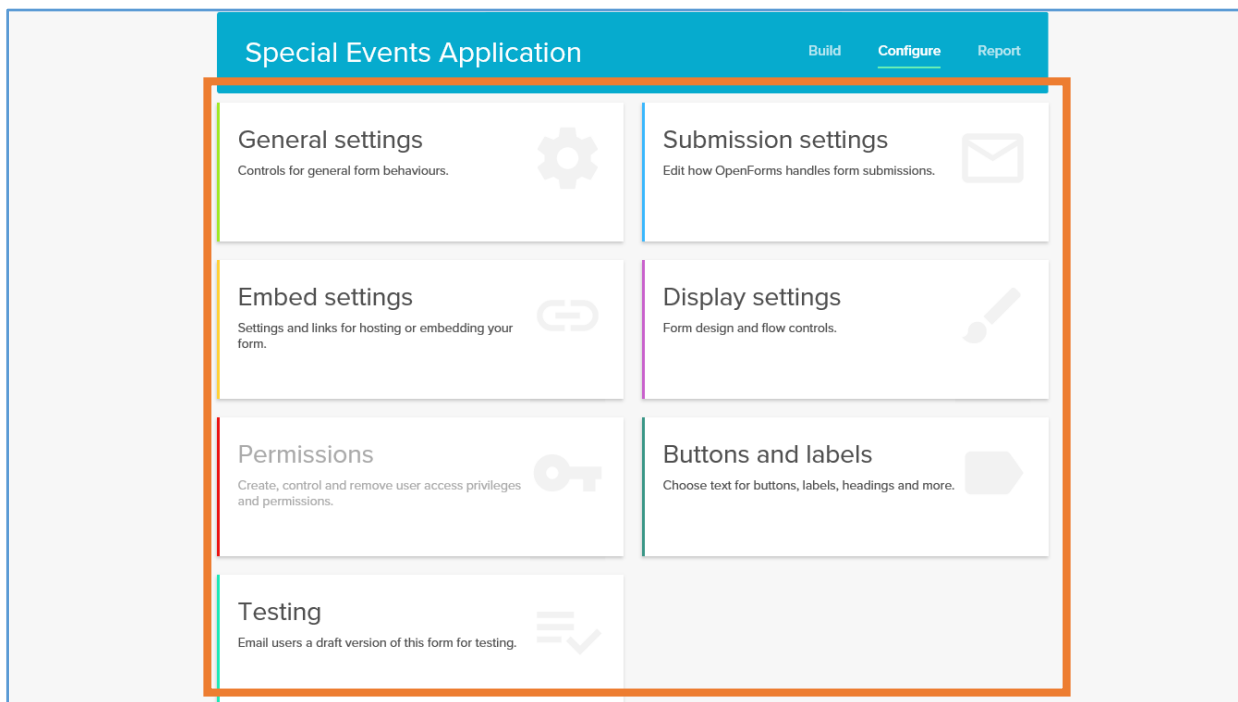
To access a form's settings, first find your **FORM** in the library and click to open it.



Click **CONFIGURE** at the top right of your form title header to access the settings.



Now you can see the **FORM SETTINGS CATEGORIES**.




Special Events Application

BuildConfigureReport

General settings

Controls for general form behaviours.


back

Form description

500 characters left

Receipt number prefix

Use CAPTCHA to make sure user is human, not a bot

☐

Hide from external search engines

☐

Language

English (United States) ▾

FORM DESCRIPTION

This section allows you to enter a short description of your form. This is for internal use only: customers will not see the form description anywhere. Think of this as an opportunity to ensure continuity in service if you move to a different position or leave the organization.

Form description

500 characters left

RECEIPT NUMBER PREFIX

Every time a customer submits a form, their submission is assigned a receipt number. You can enter a prefix – any combination of numbers and/or letters – here. This could be a department identifier, or anything you want.

Receipt number prefix

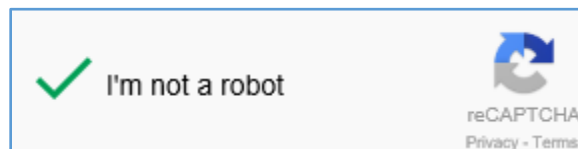
CAPTCHA ON/OFF

This feature allows you to add a CAPTCHA at the end of your form. This will ensure that all forms are submitted by real, human customers. This helps prevent spam and other cyber attacks.

Use CAPTCHA to make sure user is human, not a bot

☐

This is what customers will see at the end of the form if you enable this feature:



HIDE FROM EXTERNAL SEARCH ENGINES ON/OFF

If you turn this feature on, no one can find your form using Google or any other external search engine. Basically this means that users will only be able to find your form if you give them the link.

Hide from external search engines

☐

LANGUAGE

You can set the language here. For the most part you won't need to do this unless you are an administrator uploading Spanish language versions of forms.

Language

English (United States) ▼


SUBMISSION SETTINGS

Special Events Application

BuildConfigureReport

Submission settings

Edit how OpenForms handles form submissions.


back

Receive notification for submissions

☐

Show confirmation message on submission

☐

Send user confirmation email on submission

☐

Limit amount of submissions

☐

RECEIVE NOTIFICATION FOR SUBMISSIONS

This setting allows you to setup email notifications to one or more employees. They will receive an email each time a customer submits a form. You can even change the settings to attach a PDF version of the completed form to each email notification.

Receive notification for submissions

☒

Receiving email addresses

Notification email subject

Notification email body

Insert Tag

▼

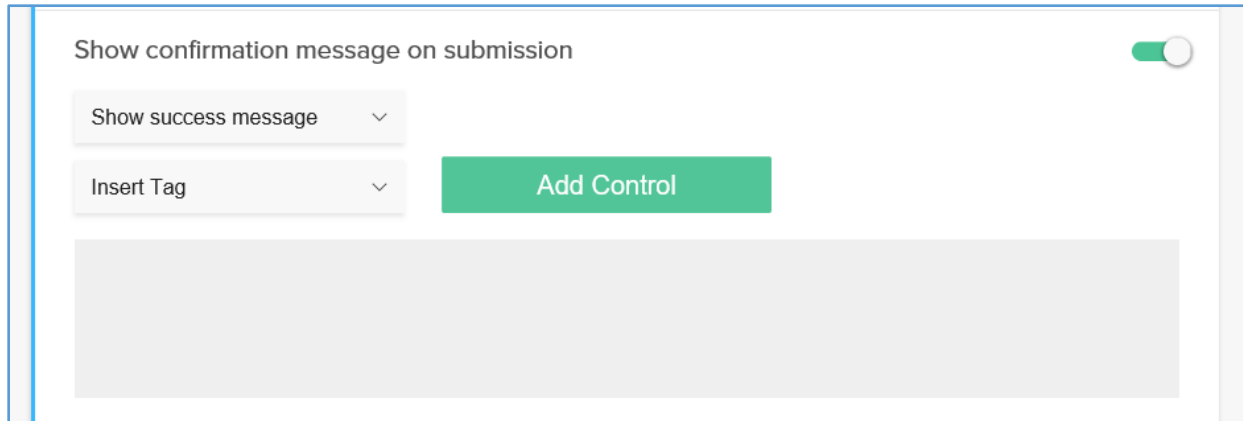
Add Control

Attach PDF copy of submission

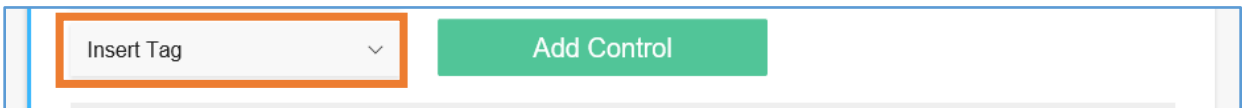
☐

SHOW CONFIRMATION MESSAGE ON SUBMISSION

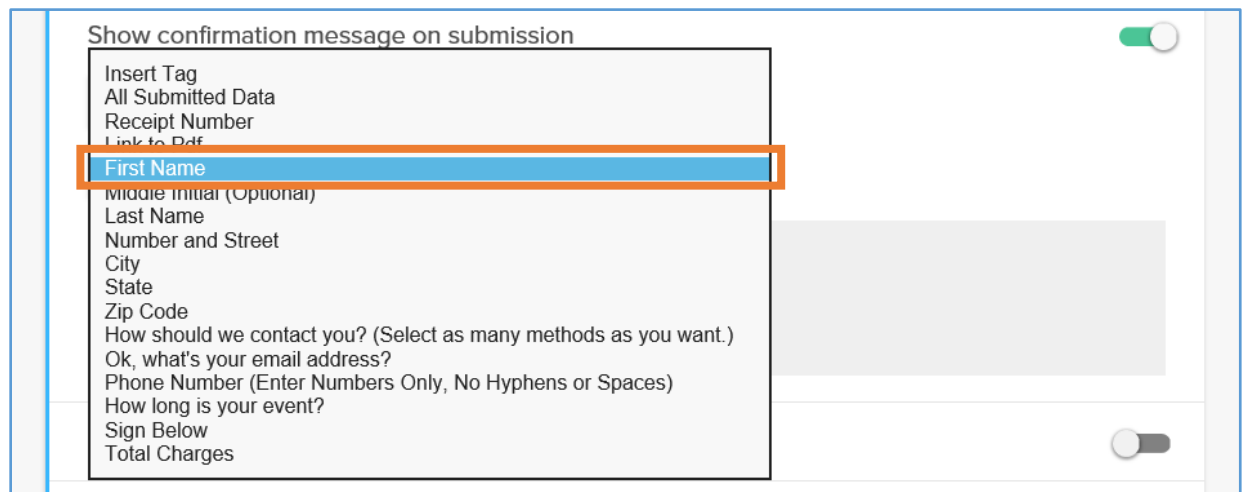
Using this setting, you can setup a message to display to customers every time they submit a completed form. You can even personalize the message to include their name if you collect it in the form. (See below.)



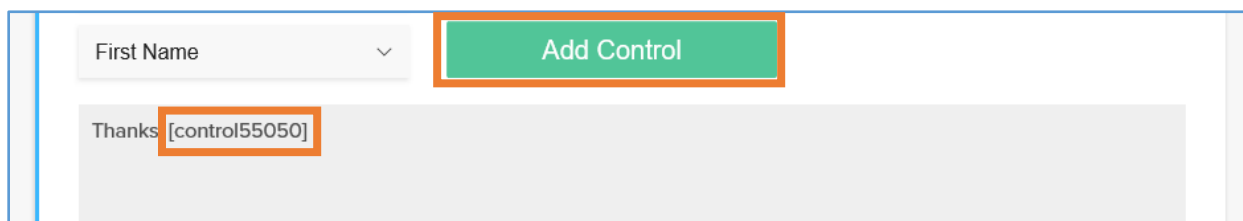
To include a field that the customer entered in the message, like first name, use the **INSERT TAG** dropdown menu.



Choose the appropriate **FIELD** from the dropdown Menu.



Click **ADD CONTROL**, and the **FIELD CONTROL** will appear in your message text.



Finish typing your message. Now when customers submit their forms, they will see your message!

Submission Complete

Thanks, Zac! We got your submission. We'll contact you with more information and status updates.

SEND USER CONFIRMATION EMAIL ON SUBMISSION

Toggleing on this setting allows you to send an email to users confirming that their completed form was submitted. The features work similarly to those of the confirmation message discussed above.

Send user confirmation email on submission

Email subject

Email body

Insert Tag

Add Control

Send emails as

We need to verify this address before you can use it, so you'll receive a verification email from Amazon Web Services. Click the link in the email to verify your address.

noreply@openforms.com

Attach PDF copy of submission

One important note here is that you can change the **EMAIL ADDRESS** that the confirmation email is sent from. This is useful because if the customer replies, the reply goes to the appropriate inbox.


Send emails as

We need to verify this address before you can use it, so you'll receive a verification email from Amazon Web Services. Click the link in the email to verify your address.

zthiel@grcity.us

LIMIT AMOUNT OF SUBMISSIONS

Turning this feature on allows you to limit the number of submissions accepted. This is useful for training sessions or other events with limited seating available. Simply enter the **NUMBER OF SUBMISSIONS** you need to limit the responses to and enter a **MESSAGE** users will see when the limit is reached.

Limit amount of submissions 

Amount of submissions

15

Submissions reached message

Registration is full! Sorry, all of the seats available in this session are reserved.

EMBED SETTINGS

The embed settings help you share your form with your customers. You can copy the link provided and insert it into a hyperlink on your webpage,

The **EMBED THIS FORM IN YOUR WEBSITE** is an advanced feature used by the GR Digital Team to place your forms on the City website.

Embed settings

Settings and links for hosting or embedding your form.

Copy a link to your form

<https://us.openforms.com/Form/a385740f-a233-4787-a332-917947f84814>

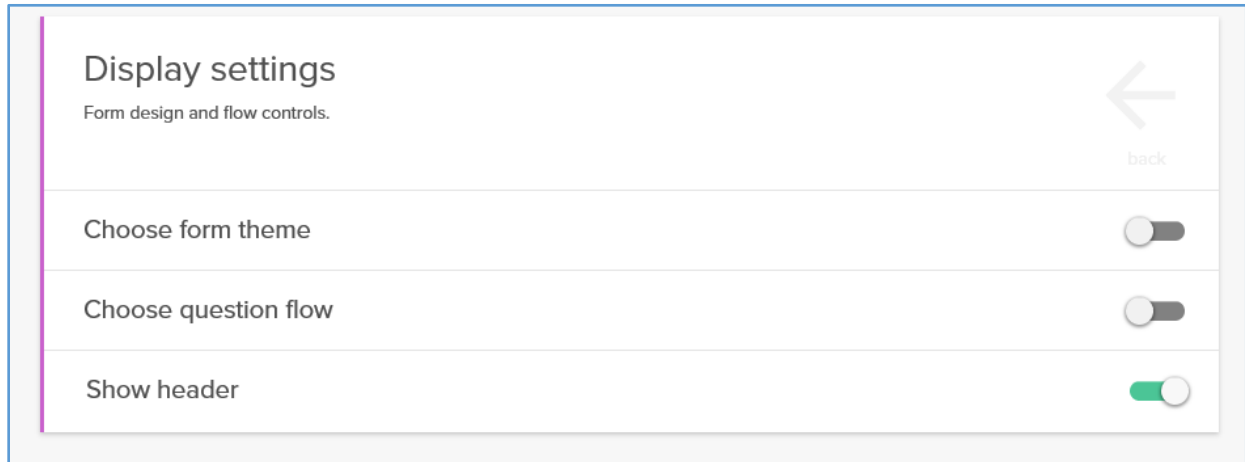
Embed this form in your website

```
<a class="seamless-smartform-anchor-iframe" href="https://us.openforms.com/Form/a385740f-a233-4787-a332-917947f84814"> Click here to view form.</a><script src="https://us.openforms.com/Scripts/embed-iframe.js"></script>
```

DISPLAY SETTINGS

The display settings allow you to change the look, feel, and navigation of your forms. These settings should not be used without instruction or direction from the GR Digital Team.

The GR Digital Team reviews and approves all forms before they are published to the web. Forms that do not meet the City's standardized look and feel will be rejected and sent back to you for modifications until these standards are met.



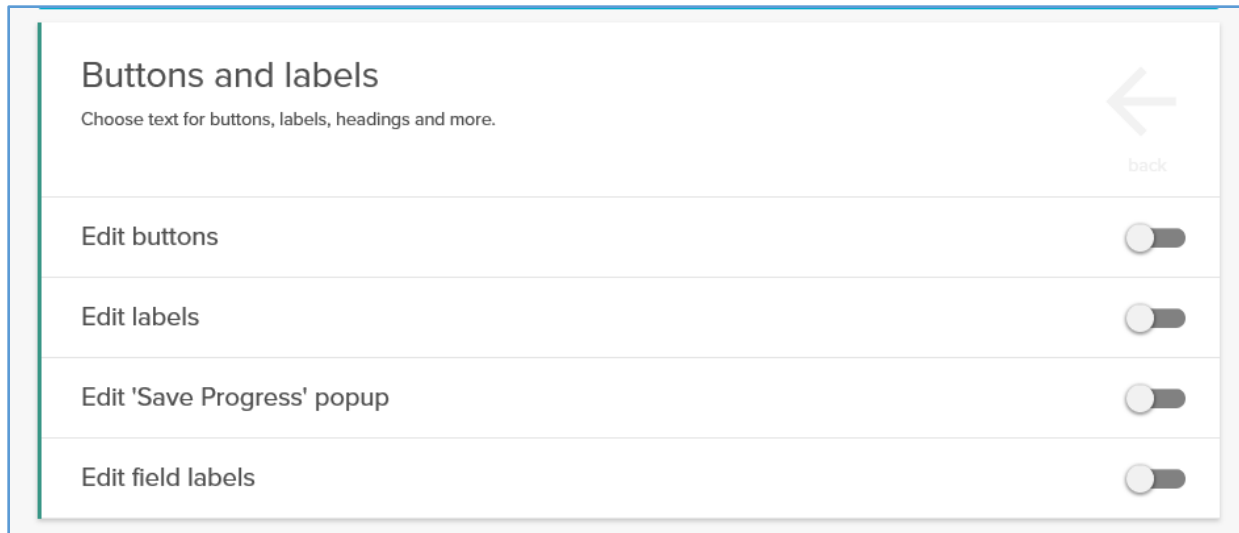
The screenshot shows a 'Display settings' configuration screen. At the top left, the title 'Display settings' is followed by the subtitle 'Form design and flow controls.' In the top right corner, there is a grey left-pointing arrow with the word 'back' underneath it. Below the header, there are three settings rows, each with a toggle switch on the right:

- 'Choose form theme' with a grey toggle switch (turned off).
- 'Choose question flow' with a grey toggle switch (turned off).
- 'Show header' with a green toggle switch (turned on).

BUTTONS AND LABELS SETTINGS

See [Editing Button Labels](#) in the [Building Forms](#) section for details on buttons and labels settings.

You should only change button labels in specific situations. If your buttons and labels edits do not meet the City of Grand Rapids' digital standards, as established by the GR Digital Team, your form will be rejected and returned for revisions until the standards are met.




Buttons and labels	
Choose text for buttons, labels, headings and more.	
Edit buttons	<input checked="" type="checkbox"/>
Edit labels	<input checked="" type="checkbox"/>
Edit 'Save Progress' popup	<input checked="" type="checkbox"/>
Edit field labels	<input checked="" type="checkbox"/>

TESTING SETTINGS

The testing settings simply allow you to send a pre-published version of your form to any email address for feedback and suggestions for improvement. Simply enter email addresses and click send!

Testing

Send people a draft of the form to test.


back

Email draft form

The link in the email will be valid for 1 month.

Enter email addresses separated by commas

Send

OPENFORMS | CONTENT IN FORMS

OVERVIEW

·SIMPLE·
·SEPARATED·
·CLEAR·

We use forms for collecting information, but sometimes we need to explain a process or provide information within a form. You should follow these general rules for content within forms:

- Keep it simple: if you need two paragraphs of text, it belongs on a webpage – not in your form.
- Separate detailed instructions into lists: make it easier for your customers to read and understand.
- Use clear language: follow the City's voice and tone guidelines. Avoid government/industry jargon.

HEADER

·TITLES FOR SPLIT FIELDS·
·SECTIONS WITHIN SECTIONS·

Headers are used as titles in specific situations:

- When you are asking for information that is split into different fields (name, address, etc.)
- When you have a smaller section within a single section of a form

A form example for a 'Your Address' section. The title 'Your Address' is at the top. Below it is a label 'Number and Street' followed by a 'required' tag. A text input field contains '300 Monroe Ave NW'. Below that is a label 'City' followed by a 'required' tag.

PARAGRAPH

·PROVIDE INFORMATION·
·KEEP IT SHORT·
·LINK TO WEBPAGES·
·CONSISTENT VOICE & TONE·

Use paragraph fields to provide short pieces of information.

- Don't overload the customer with information: keep it short. A customer using a form likely went there to get something done. Requiring too much reading in the form could drive them away.
- If you need to give the customer detailed policy information, use the paragraph field to add a hyperlink to the appropriate webpage.
- Use approachable but professional language, as detailed in the voice and tone guidelines.

You'll see your eligibility results on this page. If you applied for more than one board or commission, then you need to set a priority for each one you chose.

The above paragraph gives a clear and short explanation to the customer. Detailed instructions follow in a list.

OPENFORMS | CONTENT IN FORMS

LIST

- BULLETED LISTS·
- DETAILED INSTRUCTIONS·
- SEPARATE INTO STEPS·

Use list to break down complex descriptions, processes, instructions, etc. into more manageable pieces.

- This helps the customer quickly understand information simply by scanning your text.

What does this board do?

- 4 members representing each of the City's 3 wards
- 1 City Commissioner sits on this board
- Makes and oversees the rules of the City's civil service hiring system

IMAGES

- NOT FOR DESIGN·
- DESCRIPTIVE·

Do not use images as a design element of your form. You should only use images to describe a piece of the transaction or service.

- For a good example, think of someone reporting a sidewalk that needs to be repaired.
- It could be because of a raised crack or several cracks in the sidewalk
- It could also be because of something called *spalling*
- Few people know what spalling is, so it is useful to show the customer an image of spalled concrete





OPENFORMS | CONTENT IN FORMS

OPENFORMS: BUILDING A FORM

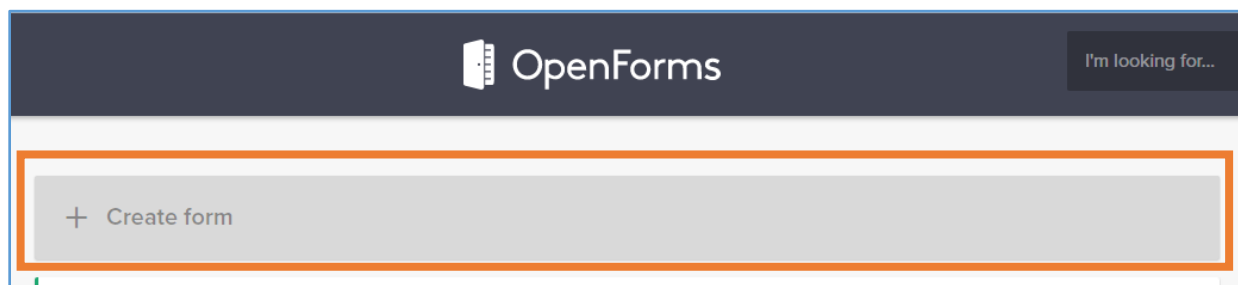
PUTTING THE PIECES TOGETHER

Now that you have learned the basic functions of the most important parts of OpenForms, it's time to put all the pieces together and build your own forms.

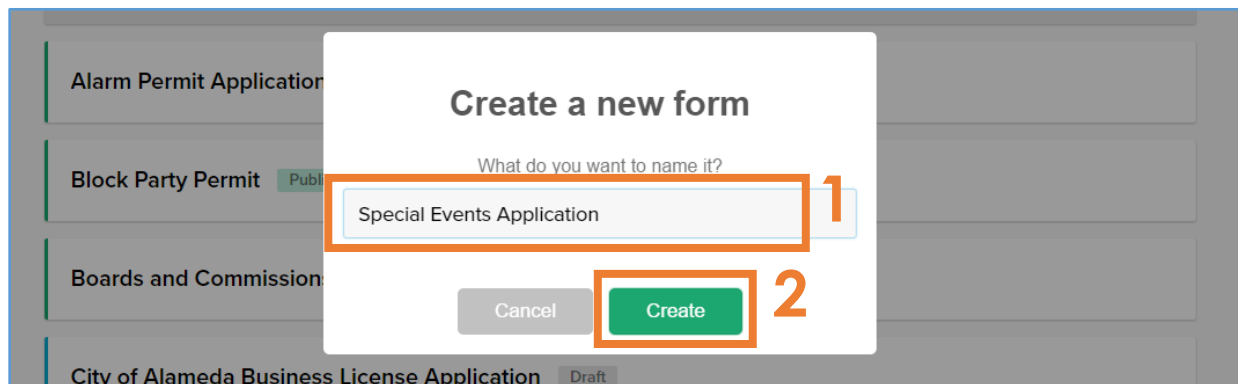
It's helpful to follow an example to understand the whole process. In this section, we'll create a form for Special Events applications.

GETTING STARTED

Log in to OpenForms and click **+ CREATE FORM**.

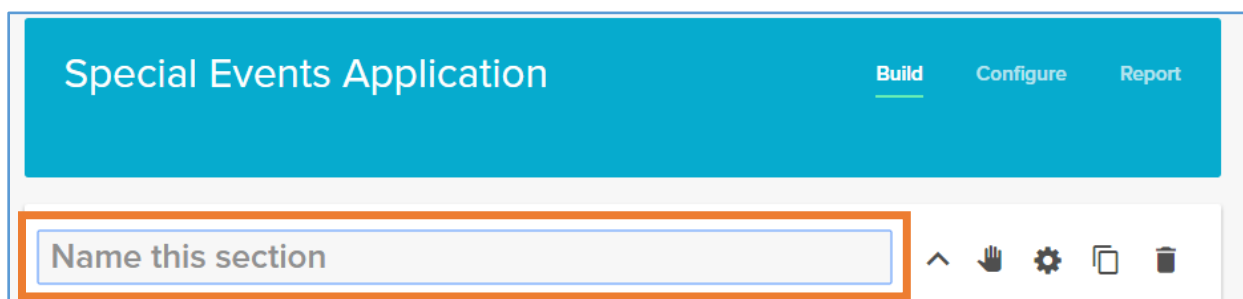


You will be prompted to give your form a **NAME (1)**. Name it, then click **CREATE (2)**.



ADDING THE FORM FIELDS

Now we are in the form editor. Name the first section by clicking **NAME THIS SECTION**.



In this example the first section is titled *Contact Information*.

The screenshot shows the top of a web application titled 'Special Events Application'. Below the title bar, there is a section titled 'Contact Information'.

Next, we add a **TEXT FIELD (1)** by dragging and dropping a text field below the section title. Then, we click the **QUESTION TITLE (2)** to change it to ask for the contact's name.

The screenshot shows the 'Special Events Application' interface with a 'Contact Information' section. A text field has been added below the section title. The text field has a green header area labeled 'Question title' (highlighted with an orange box and numbered 1) and a white input area with placeholder text 'Enter placeholder text' (highlighted with an orange box and numbered 2). A 'Text' button is visible next to the input area.

We need to change the **QUESTION TITLE (1)** and **PLACEHOLDER TEXT (2)**. Placeholders show the customer how we expect them to enter their information. This will minimize errors and make the data collected more easily sorted and analyzed.

The screenshot shows the 'Contact Information' section. The text field now has a question title 'First Name' (highlighted with an orange box and numbered 1) and a placeholder text 'ex) Jane' (highlighted with an orange box and numbered 2).

Next we add another text field requesting the applicant's middle initial and last name. We follow the same process as the above. If a field is **OPTIONAL**, let the customer know in parentheses in the question title.

The screenshot shows the 'Contact Information' section. A new text field has been added with a question title 'Middle Initial (Optional)' (highlighted with an orange box) and a placeholder text 'Enter placeholder text'. Below it is another text field with a question title 'Last Name' and a placeholder text 'ex) Smith'.

When getting contact information, it is a good idea to ask the customer how they prefer to be contacted. Because they may prefer more than one type of contact, the **CHECKBOX FIELD** works best for this question.

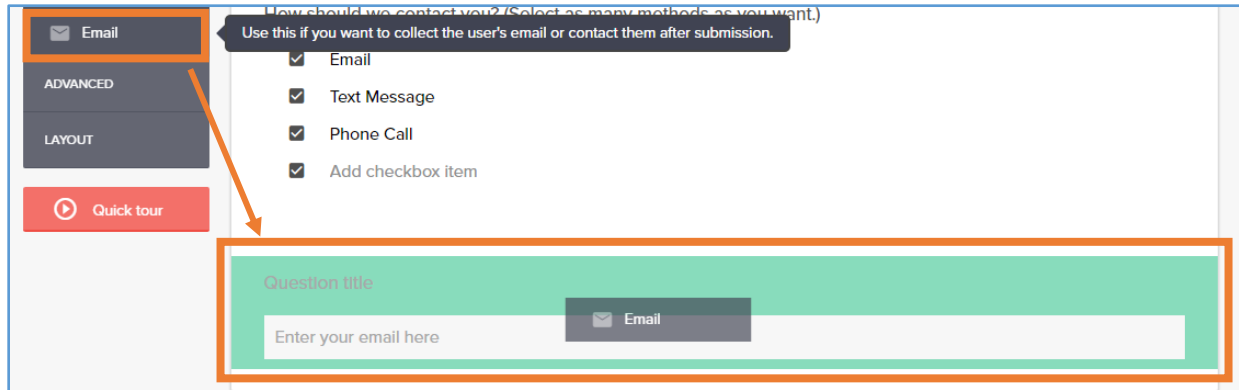
The screenshot shows a form builder interface. On the left is a sidebar with a list of field types: 'Checkbox' (highlighted with an orange box and an arrow pointing to the main area), 'Radio button', 'File upload', 'Date', 'Email', 'ADVANCED', and 'LAYOUT'. Below the sidebar is a red 'Quick tour' button. The main area displays a form with fields for 'Wyoming', 'Zip Code' (with an example 'ex) 49503'), and 'Contact Preference'. The 'Contact Preference' field is highlighted with an orange box and contains a 'Question title' label, a 'Checkbox' button, and a list item 'Add checkbox item' with a checked checkbox.

Change the **QUESTION TITLE** (1) and add each **CHECKBOX ITEM** (2). With Checkbox fields, you should always let the customer know that they can select more than one. Add this **ADDITIONAL INFORMATION** (3).

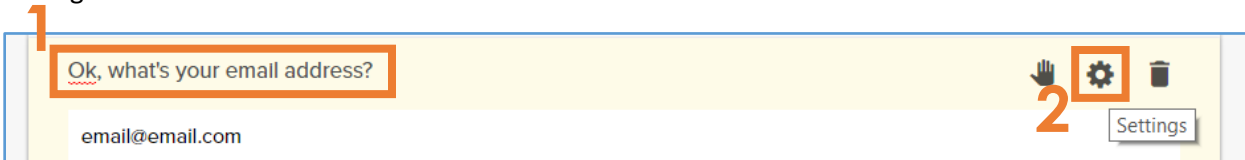
The screenshot shows a completed form titled 'How should we contact you? (Select as many methods as you want.)'. The form contains a list of checkbox items: 'Email', 'Text Message', 'Phone Call', and 'Add checkbox item'. The form is annotated with three orange boxes and numbers: (1) points to the question title, (2) points to the list of checkbox items, and (3) points to the additional information text '(Select as many methods as you want.)'.

USING SMART LOGIC

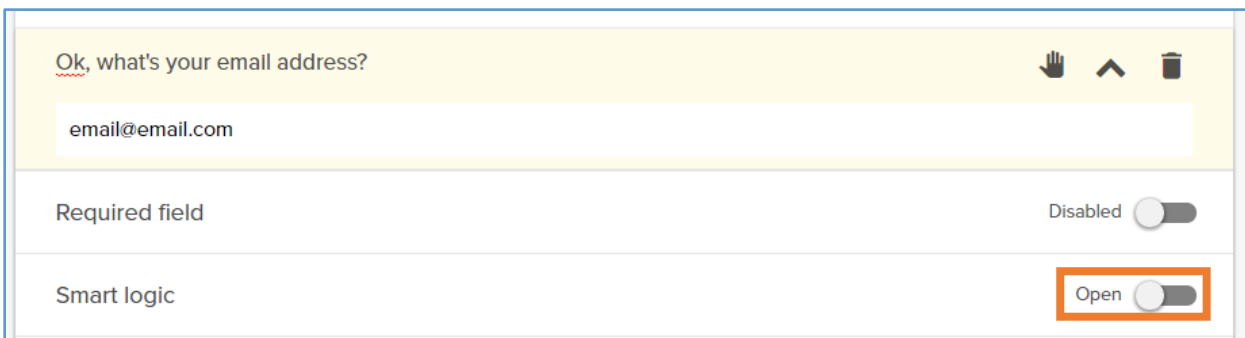
Now we need to ask for the customer's email address and/or phone number based on their response to this question. This is where smart logic is important. First, we will add an **EMAIL FIELD** for the customer's email address.



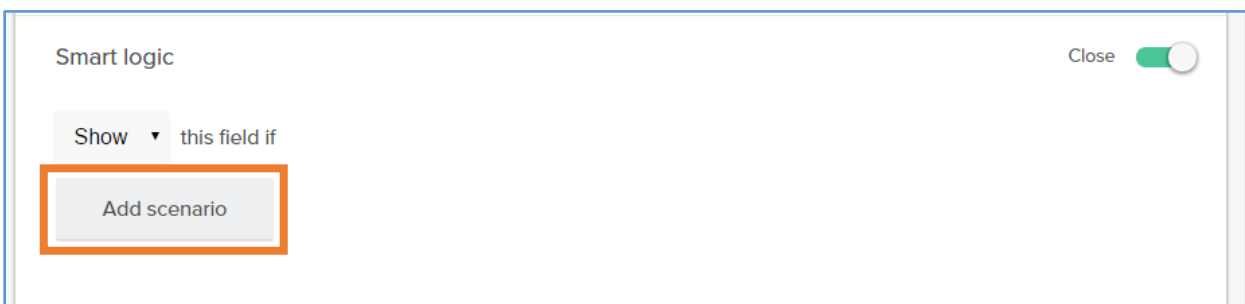
Next, we change the **QUESTION TITLE (1)**, then click the **SETTINGS ICON (2)** to change the smart logic settings.



Click the **OPEN SLIDER BUTTON** on the Smart Logic settings.



Click **ADD SCENARIO** to set this question to appear only if the customer selects Email from the checkbox question above.



Now we need to tell the computer when to show this question based on the answer before. To do this we need to select the **SECTION (1)** the checkbox question is in and then select the **CONTROL QUESTION (2)** from that section.

Smart logic

Close ☒

Show ▾ this field if

1st Scenario

Add a rule:

1 -- Section -- ▾ 2 -- Control -- ▾ Add

Current rules:

No rules added

So, we select *Contact Information* and *How should we contact you?* from the section and control options. Two new boxes appear that allow us to actually set the rules that tell the computer to show this question. We want to ask for the customer's email if the previous answer **INCLUDES EMAIL**.

Smart logic

Close ☒

Show ▾ this field if

1st Scenario

Add a rule:

Contact Information ▾ How should we contact you? ▾ includes ▾ Email ▾ Add

Current rules:

No rules added

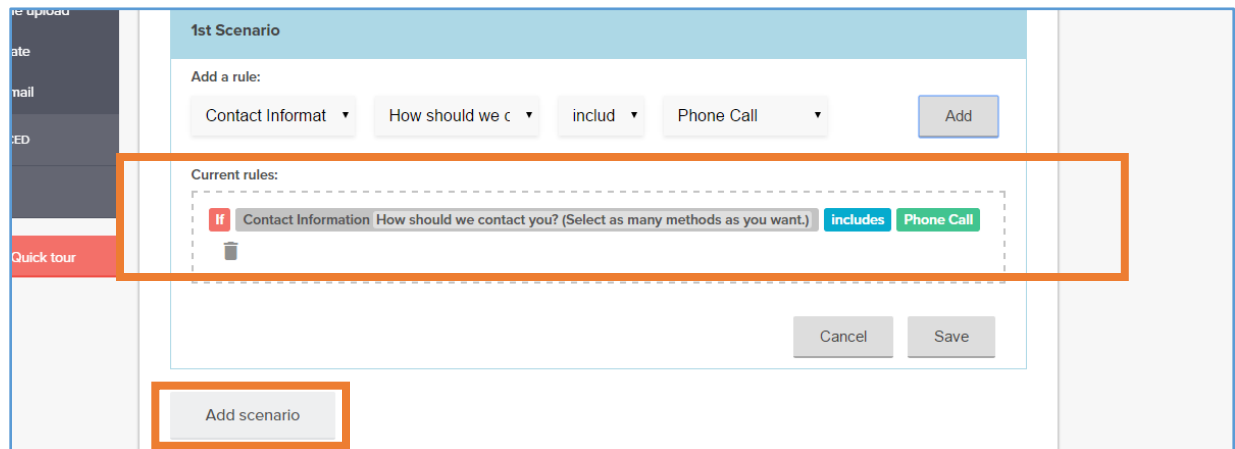
Now we click **ADD (1)**, then we click **SAVE (2)**. You have to click add before you click save, or you will lose your rule and have to start over again. If you see your rule in the **CURRENT RULES (3)** section, you are ready to click save.

To close the question settings, click the **UP-FACING ARROW** next to the question title.

Now we'll add a **NUMBER FIELD** to collect the customer's phone number if they prefer contact by phone call or text message.

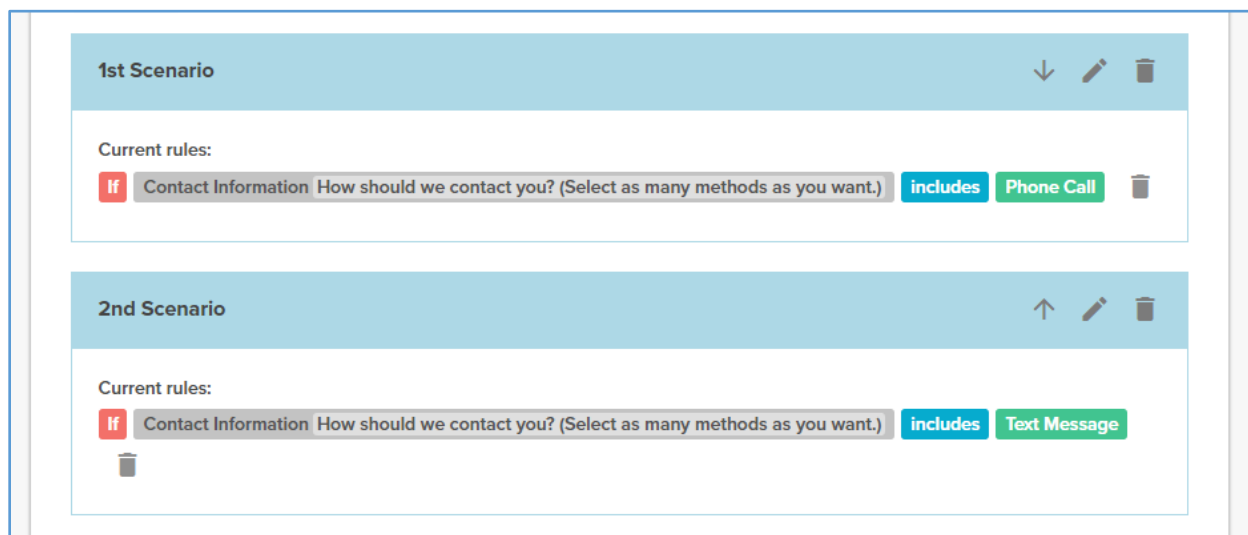
NOTE: It's best to use a number field to collect phone numbers and have the customer enter their number without any hyphens or other special characters. This makes it easy to send a text message to a large group.

We need to add the smart logic that tells the computer when to show this question as well. So we follow the same steps as before. Notice that we set the question to show when the customer's answer to the contact question was *Phone Call*, but we also need to show this question if the customer's answer includes *Text Message*. We need to click **ADD SCENARIO (1)**.

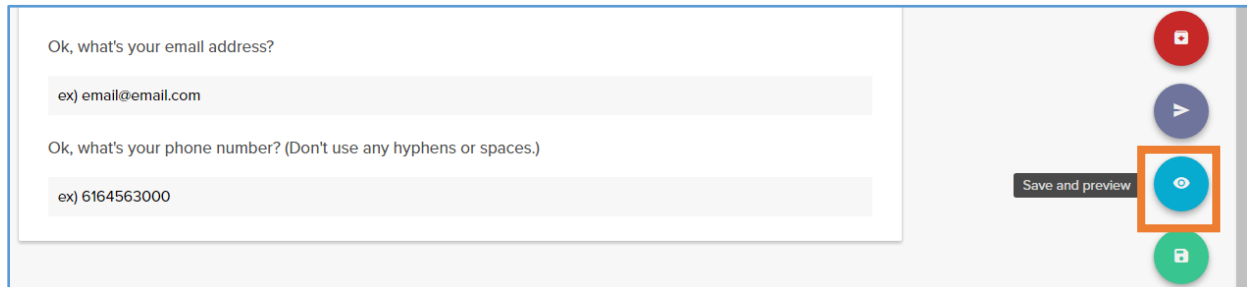


Note: If we add another rule to the same scenario, then the phone number question will only show if the customer selects both *Phone Call* and *Text Message*. When we add *Text Message* as a separate scenario, the question will show if the customer selected either *Phone Call* or *Text Message* or both, which is what we want.

Now we have set two separate scenarios that will show this question: if either the *Phone Call* or the *Text Message* boxes are selected in the previous question.



After saving your smart logic, you should **SAVE AND PREVIEW** your form to test the smart logic. If it isn't working, look at your smart logic settings to find your errors and fix them.



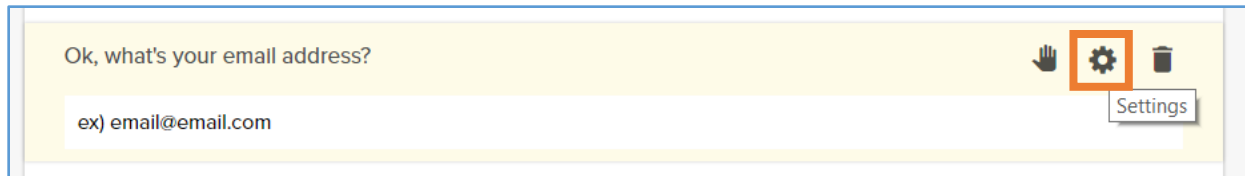
The screenshot shows a form builder interface. On the left, there are two text input fields. The first field is labeled "Ok, what's your email address?" and contains the placeholder text "ex) email@email.com". The second field is labeled "Ok, what's your phone number? (Don't use any hyphens or spaces.)" and contains the placeholder text "ex) 6164563000". On the right side of the interface, there is a vertical stack of four circular buttons: a red button with a square icon, a blue button with a checkmark icon, a blue button with a magnifying glass icon (highlighted with an orange box), and a green button with a square icon. A label "Save and preview" is positioned to the left of the magnifying glass button.

If your smart logic is working, you can move on to the next step in your form. For this example, the *Contact Information* section is almost complete.

ADDING IMPORTANT COMMENTS IN FIELDS

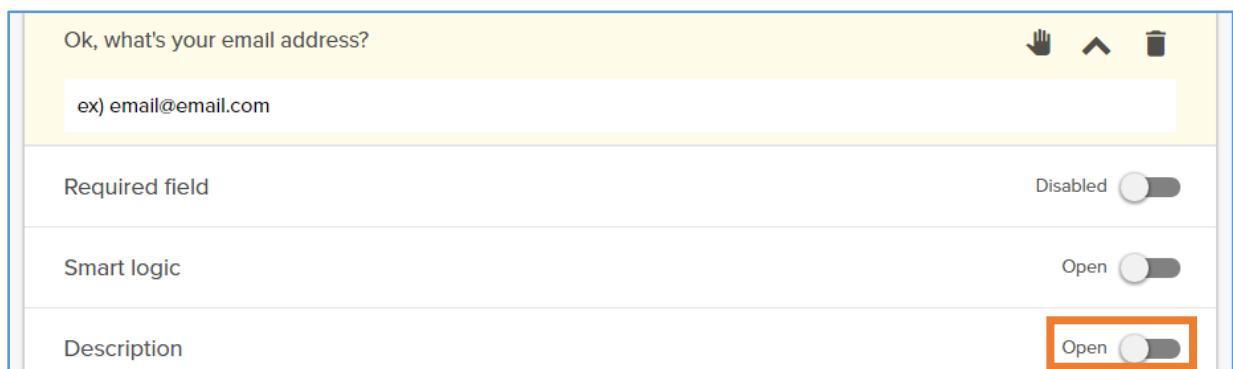
There are times when adding additional comments to a form field is useful. Here's a good example of this: when we ask for an email address or phone number, we want to make sure that our customers know that we won't bombard them with messages unrelated to our service.

To add a message click on the **SETTINGS ICON** in the form field you are adding the message to.



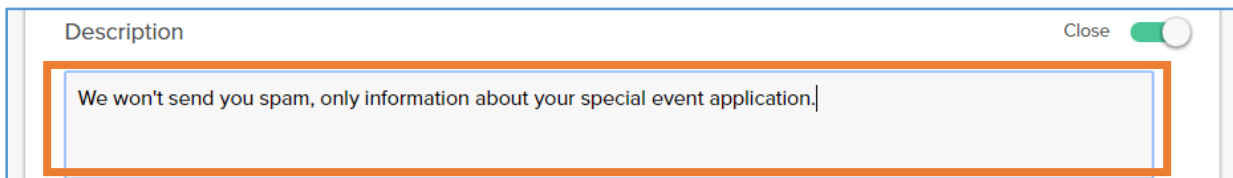
A screenshot of a form field with the label "Ok, what's your email address?". Below the label is a text input field containing "ex) email@email.com". To the right of the input field are three icons: a hand, a gear (the settings icon, which is highlighted with an orange square), and a trash can. A "Settings" tooltip is visible next to the gear icon.

From the settings menu, click the Description **OPEN SLIDER BUTTON**.



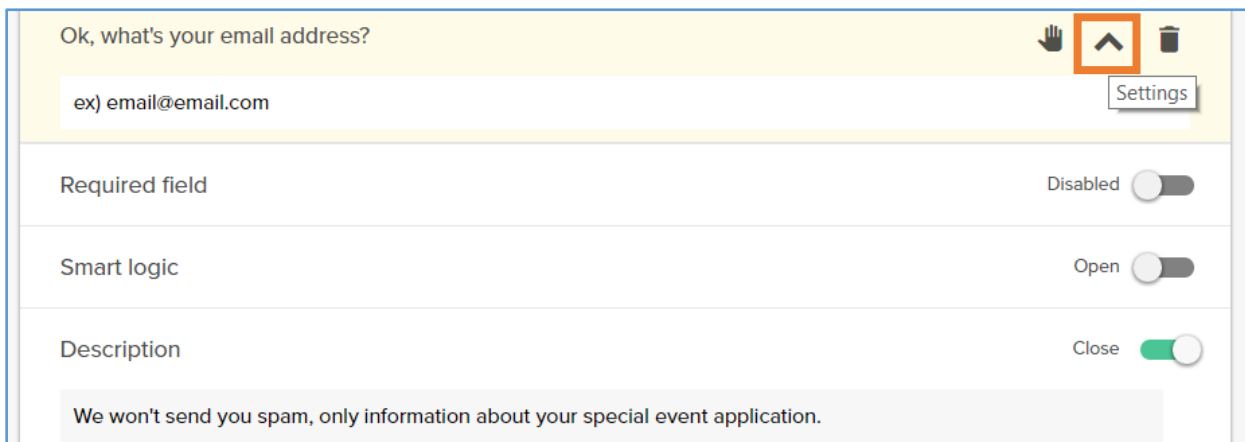
A screenshot of the settings menu. It shows three rows: "Required field" with a "Disabled" toggle, "Smart logic" with an "Open" toggle, and "Description" with an "Open" toggle. The "Open" toggle for the "Description" row is highlighted with an orange square.

When you click below Description, a **TEXT BOX** appears, and you can type your message here.



A screenshot of the "Description" settings row. A text box is open, containing the text "We won't send you spam, only information about your special event application." The text box is highlighted with an orange border. To the right of the text box is a "Close" button with a green toggle switch.

When you're done typing your message, click the **UP-FACING ARROW** on the form field to close the settings menu.



A screenshot of the form field after the settings menu is closed. The "Description" row now shows the text "We won't send you spam, only information about your special event application." The "Up-facing arrow" icon (highlighted with an orange square) is now visible in the top right corner of the form field, next to the "Settings" tooltip.

When you preview your form after entering the description, you will see that it appears just below the question.

Ok, what's your email address?

We won't send you spam, only information about your special event application.

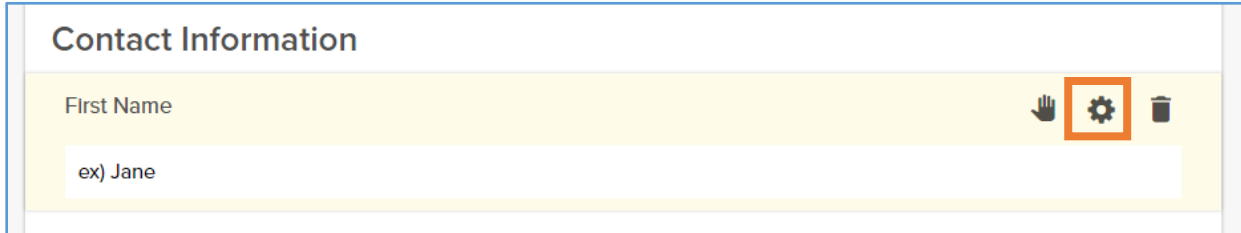
ex) email@email.com

MAKING FIELDS REQUIRED

One of the greatest advantages of online forms over paper forms is that customers can't turn in an incomplete form. This is because we can require that certain fields be completed before allowing customers to move to the next section or submit their form.

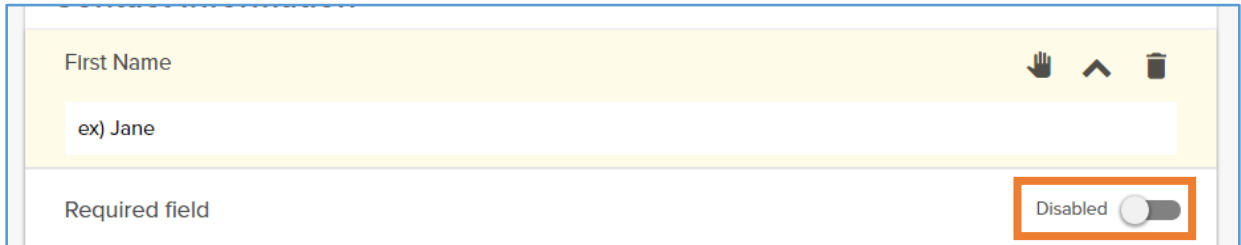
In our *Contact Information* section, we need to require every field. We *have to know* the applicant's name, address, preferred contact method, and email and/or phone number.

First, click the **SETTINGS ICON** for the field you need to make required.



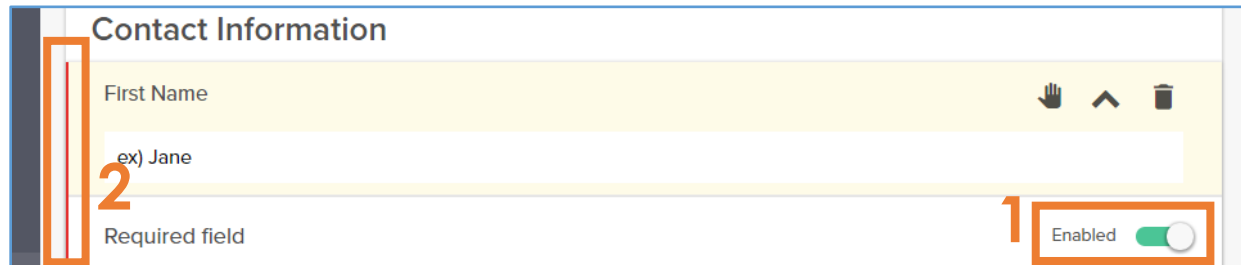
The screenshot shows a form section titled "Contact Information". Below the title is a yellow bar containing the label "First Name" and three icons: a hand, a gear (the settings icon, highlighted with an orange box), and a trash can. Below the yellow bar is a text input field with the placeholder text "ex) Jane".

Required Field is the first option in the settings menu. Click the **DISABLED SLIDER BUTTON** to make a question required.



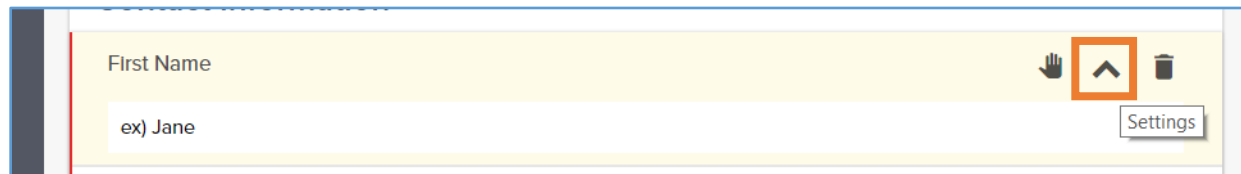
The screenshot shows the settings menu for the "First Name" field. The menu is a white box with a yellow header. The "Required field" option is selected. At the bottom right, the "Disabled" slider button is highlighted with an orange box.

After clicking the button, its status will change to **ENABLED (1)**, and a **RED BAR (2)** appears along the left side of the field.



The screenshot shows the "Contact Information" section with the "First Name" field. A red vertical bar (2) is now visible on the left side of the field. The settings menu is still open, and the "Enabled" slider button (1) is highlighted with an orange box.

Close the settings menu using the **UP-FACING ARROW**.



The screenshot shows the "Contact Information" section with the "First Name" field. The settings menu is closed. The "Up-facing arrow" icon (1) is highlighted with an orange box. A "Settings" button is visible in the bottom right corner of the field.

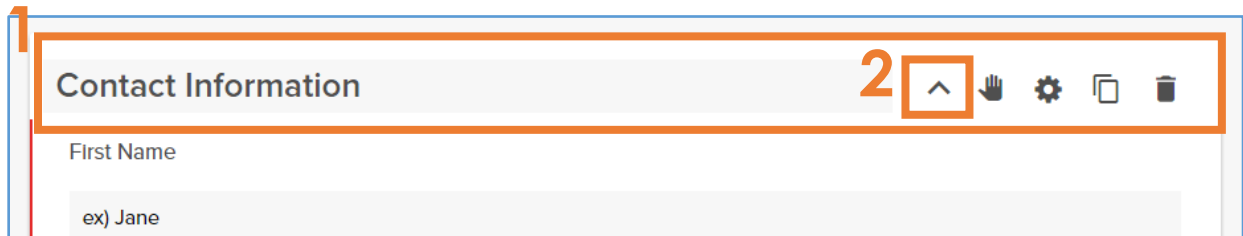
Repeat this process for every field that should be required in your form.

ADDING A NEW SECTION

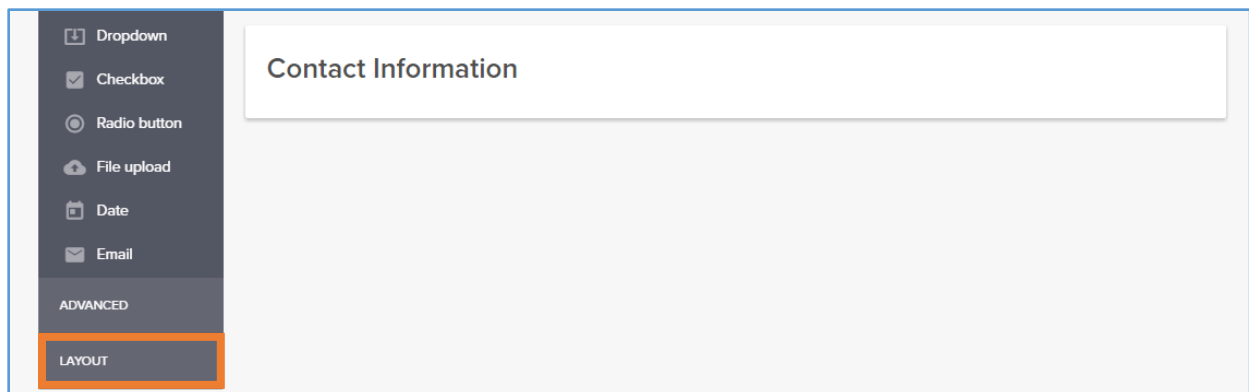
Using form sections serves two purposes: it makes it easier for you to stay organized when creating your form, and it makes the form more approachable for customers when there are natural breaks in the form.

The first thing you should do when you are adding a new section is hide the section you just finished. This will keep your workspace organized and clutter-free.

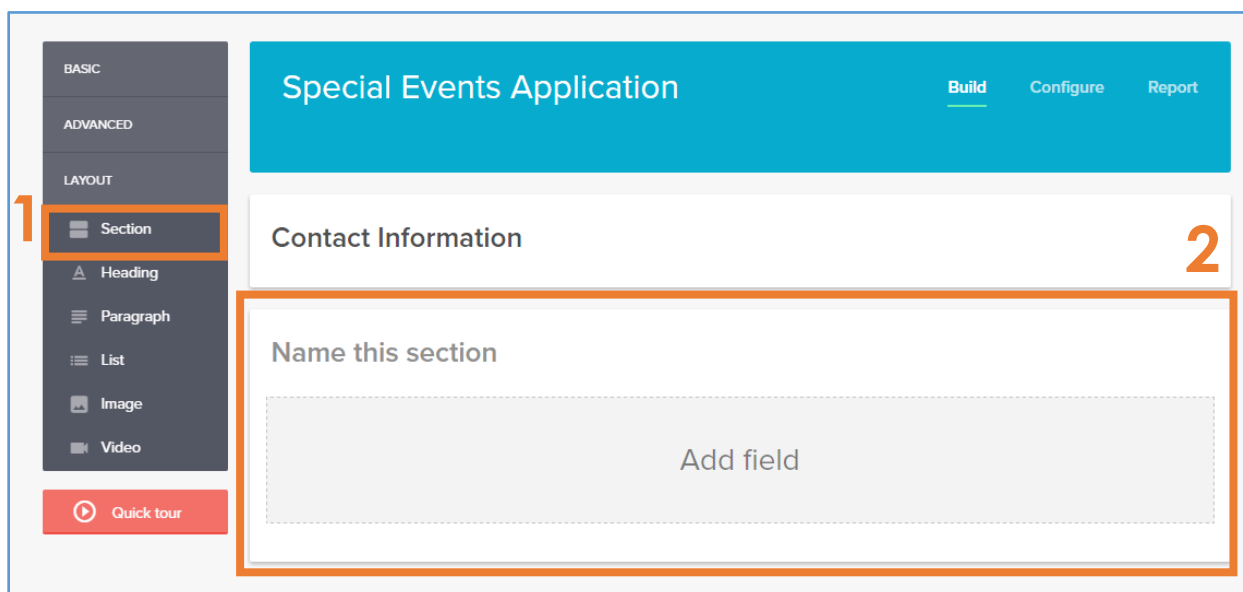
Hover over the **SECTION TITLE (1)** and click the **UP-FACING ARROW (2)** to collapse/hide the finished section.



Next, click **LAYOUT** to open the formatting tools.



Under layout, click **SECTION (1)**. A **NEW SECTION (2)** will be placed below all of your form's existing sections.

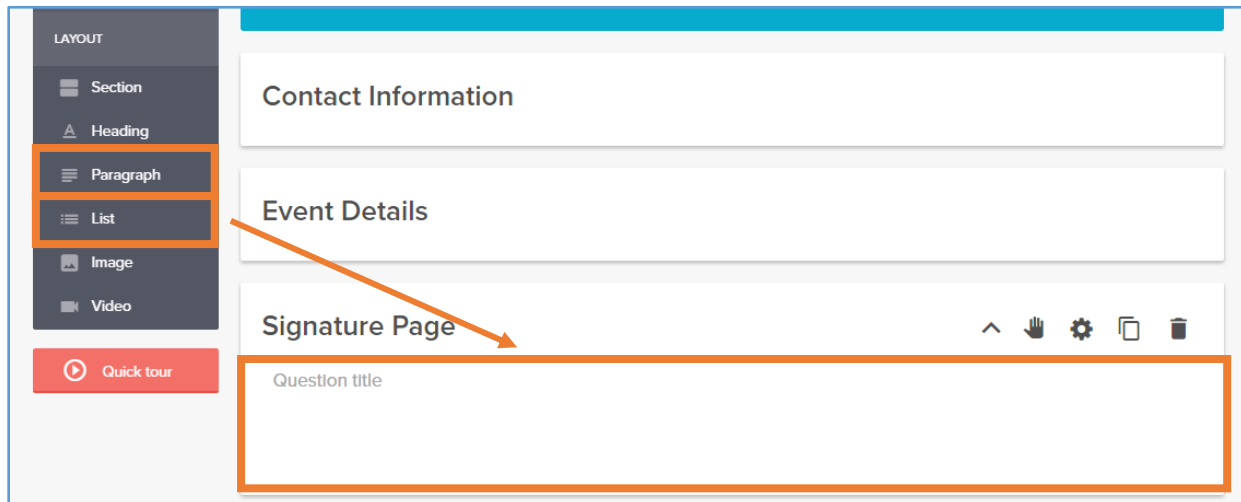


CAPTURING SIGNATURES

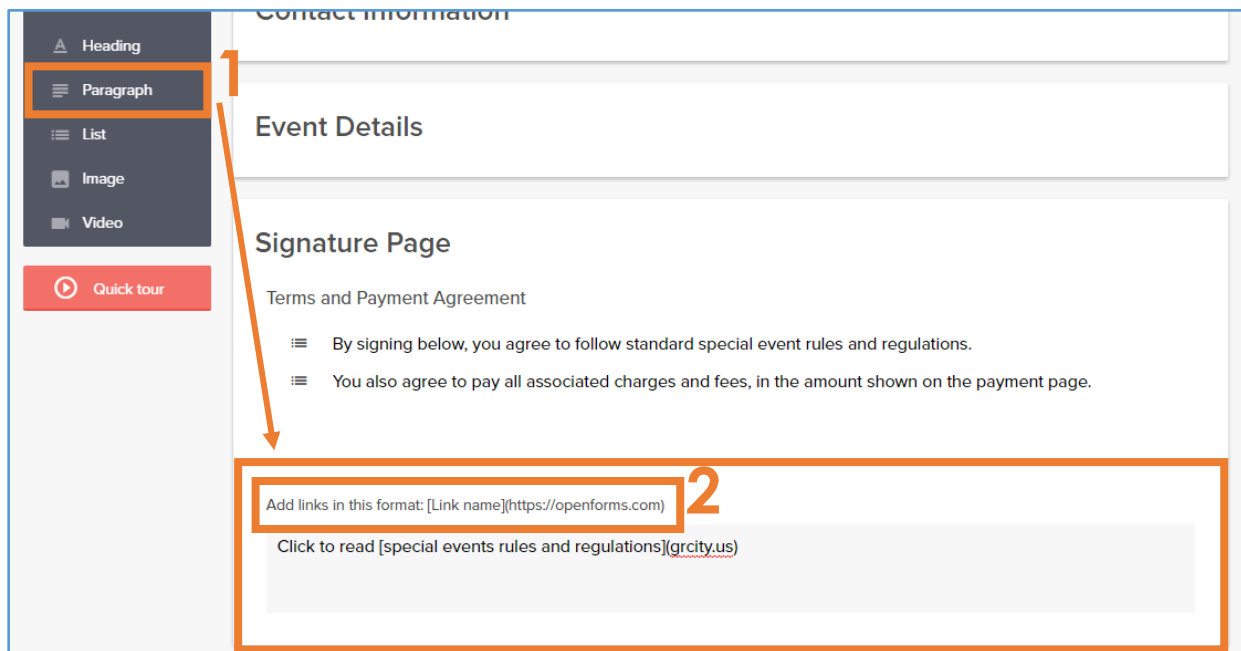
OpenForms allows customers to sign forms indicating agreement to the terms of your service/transaction. The customer signs using either their mouse/cursor on a computer or their finger on a touchscreen device.

These signatures are widely accepted as valid under Michigan law. If you are questioning whether your service type can accept these electronic signatures, contact the GR Digital Team for guidance.

Create a signature page section and add a **PARAGRAPH** or **LIST** field to enter the terms and charges the customer is agreeing to follow and pay.



Enter the terms of the agreement and payment. The list field is useful here because you can separate each part of the agreement into more readable pieces. It's a good idea to include a **PARAGRAPH FIELD (1)** with a link to your service/transaction's standard terms so that the customer can review these before signing. The paragraph field includes **INSTRUCTIONS (2)** for adding hyperlinks.



Now it is time to add the **SIGNATURE FIELD** to collect the customer's signature. Change the question title to *Sign Below*.

The screenshot shows the OpenForms editor interface. On the left is a sidebar with a menu containing 'Signature' (highlighted with an orange box), 'Payment', 'Radio matrix', 'Check matrix', 'LAYOUT', and a 'Quick tour' button. The main workspace displays a form titled 'Contact Information' and 'Event Details'. Below these is a section titled 'Signature Page' which includes 'Terms and Payment Agreement' with two bullet points, a link placeholder, and a 'Sign Below' question. The 'Sign Below' question is highlighted with an orange box, and an orange arrow points from the 'Signature' menu item to it. The question field shows a pencil icon and a signature line.

This is what customers see when they get to this section.

The screenshot shows the 'Special Events Application' form as it appears to the customer. It has a blue header with the title 'Special Events Application'. Below the header is a progress bar showing 'My Progress: 67%'. The main section is titled 'Signature Page' and contains 'Terms and Payment Agreement' with two bullet points. Below the terms is a link: 'Click to read [special events rules and regulations](#)'. The 'Sign Below' section is titled 'Sign Below' and includes the instruction 'Sign below using your mouse or upload a signature file from your computer:'. There is a horizontal line for signing and an 'or' button with an upload icon.

CALCULATING AND ACCEPTING PAYMENT

Some services require payments. OpenForms has the ability to calculate total costs based on either number fields that the customer has completed or flat costs for a service. Calculated fields can also add taxes and/or fees. If your service requires payment, this should be the last section of your form.

Add a new **SECTION** and title it *Payment*.

The screenshot shows the OpenForms editor interface. On the left, a sidebar menu contains options: 'Section' (highlighted with an orange box), 'Heading', 'Paragraph', 'List', 'Image', and 'Video'. Below the menu is a red 'Quick tour' button. The main form area displays three sections: 'Contact Information', 'Event Details', and 'Signature Page'. A new 'Payment' section has been added at the bottom, outlined with an orange box. Inside the 'Payment' section, there is a dashed box labeled 'Add field'.

Some services have a fixed rate with no variation based on customer choices. In this case, all we need is a **PAYMENT FIELD** to charge the customer the fixed price of our service/transaction.

The screenshot shows the OpenForms editor with the 'Payment' section selected in the sidebar menu (highlighted with an orange box). A tooltip at the top reads: 'Accept payments from users. There can only be one payment field per form.' The main form area shows the 'Payment' section outlined with an orange box. Inside this section, the 'Question title' field is empty. Below it, a text label reads: 'Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:'. There are two input fields: a currency field with '\$' and '00.00' (highlighted with an orange box) and a dropdown menu labeled 'Reference calculator field'.

Change the **QUESTION TITLE (1)** and **COST (2)** in the payment field.

The screenshot shows the OpenForms editor with the 'Charges and Fees' section selected in the sidebar menu (highlighted with an orange box). The main form area shows the 'Charges and Fees' section outlined with an orange box. Inside this section, the 'Question title' field is labeled 'Charges and Fees' (highlighted with an orange box and labeled '1'). Below it, a text label reads: 'Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:'. There are two input fields: a currency field with '\$' and '50.00' (highlighted with an orange box and labeled '2') and a dropdown menu labeled 'Reference calculator field'.

Other services will have several possible charges based on options that the customer chooses. In this case, you will need to add a **CALCULATION FIELD** in addition to a payment field.

Payment

Question title

Build a formula by inserting existing values from the drop-down below and then typing in any mathematical operations and numbers. Create new custom values based on a field above, such as radio buttons, checkboxes or drop-downs, so that you can assign numerical values to a textual option.

Formula:

Enter your formula here e.g. [Animal Fee]*[Number of Animals]+50.54

Select an existing value:

-- Select a value --

Edit Insert

Add custom value based on a field

-- Select a value --

Add

Charges and Fees

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 50.00 OR Reference calculator field -- Select a value --

In this example, we are using a made up formula for calculating the cost of a special event. We will use the length of the event (number of hours) multiplied by a standard rate per hour. Insert the *How long is your event?* Field using the **SELECT A VALUE INPUT (1)**. Click **INSERT (2)** to add this to the Formula.

Payment

Question title

Build a formula by inserting existing values from the drop-down below and then typing in any mathematical operations and numbers. Create new custom values based on a field above, such as radio buttons, checkboxes or drop-downs, so that you can assign numerical values to a textual option.

Formula:

Enter your formula here e.g. [Animal Fee]*[Number of Animals]+50.54

Select an existing value:

-- Select a value --

Edit Insert

-- Select a value --

Ok, what's your phone number? (Don't use any hyphens or spaces.) (Numberbox)

How long is your event? (Numberbox)

-- Select a value --

Add

Now, in this example, we multiply the number of hours that the customer enters by the cost per hour in the **FORMULA** field. For this example, we will use a rate of \$50 per hour.

Total Charges

Build a formula by inserting existing values from the drop-down below and then typing in any mathematical operations and numbers. Create new custom values based on a field above, such as radio buttons, checkboxes or drop-downs, so that you can assign numerical values to a textual option.

Formula:

[How long is your event?]*50

Select an existing value:

-- Select a value -- Edit Insert

Add custom value based on a field

Add

Now, select the **REFERENCE CALCULATOR FIELD** from the dropdown menu in the payment field below the calculated field. Now the customer is charged what is calculated from their selections in the form.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field

Total Charges

In this final step for accepting payment, we connect the City's payment gateway to the form. Without this step your form can't actually accept payment. Your form **WILL NOT ALLOW YOU TO SAVE** without connecting the gateway.

Payment

Select a payment gateway in the settings for this field.

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges

First, click on the **SETTINGS ICON** for the payment field.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges

Settings

Click the **OPEN SLIDER BUTTON** on the Select credit card gateway settings item.

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges ▼

Smart logic Open ☐

Description Open ☐

CSS class name Open ☐

Select credit card gateway Open ☐

Select the City's payment gateway from the **DROPDOWN MENU**. After you save your form, it's now complete and ready to accept payment for your service/transaction!

Payment

Enter the cost in dollars and cents to be charged or select a calculation field where the value should be drawn from:

\$ 00.00 OR Reference calculator field Total Charges ▼

Smart logic Open ☐

Description Open ☐

CSS class name Open ☐

Select credit card gateway Close ☐

A FINAL NOTE

OpenForms is a tool that can create very complex forms for a variety of uses. If you are struggling with building a complex form, don't assume that it can't be done. Contact the GR Digital Team for guidance and suggestions.

OPENFORM: EDITING A FORM

ITERATE. THEN ITERATE AGAIN.

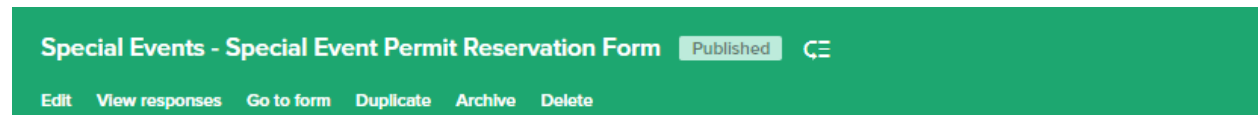
Now that your form has been out there and you've gotten feedback from customers, there are probably some changes to make.

Jumping into the form to make edits seems like the right thing to do to make changes on the fly. This is not best practice! The reason is that the form will break whenever you click *Save*. That means anyone working on the form or any saved forms will lose data.

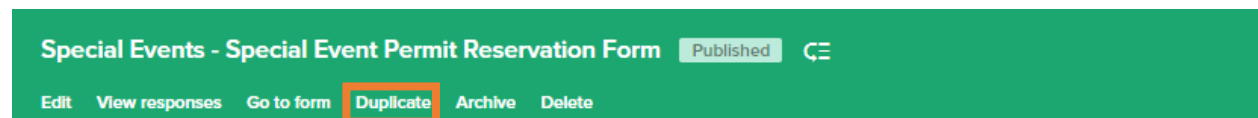
Your first step, then, is to duplicate your form. Follow the instructions below to make changes to your form.

DUPLICATE YOUR FORM

Log in to OpenForms and find your form



Hover over the form and click *Duplicate*



Name the duplicate form. Use the original form's exact naming and add the version (V2, V3, V4, etc.)

Duplicate this form

Let's give it a name

al Events - Special Event Permit Reservation Form V2

Cancel Confirm name

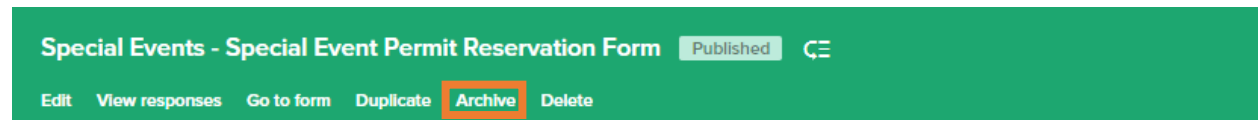
Naming convention: **ORIGINAL FORM NAME + V#**

Click *Confirm name*

ARCHIVE THE OLD

Before you jump into the new version, hover over the original/previous version of the form again

Click *Archive*. This declutters the forms listing and limits confusion



IN WITH THE NEW!

Now starts the fun of editing the form. Keep in mind that whenever you make changes, we need to test the form again to make sure the content displays correctly and the SmartLogic functions as intended.

Need to add payment or have a tricky calculation? Let's talk about it! The GR Digital team is here to bounce ideas off of and to set you up for success.

OK, now go to the duplicate form you just created. You'll see that not only is content duplicated, but all the settings are too! This means you don't have to recreate submission confirmation notifications or emails, hooray!

A screenshot of the OpenForms configuration interface for 'Special Events - Special Event Permit Reservation Form V2'. The interface is divided into three main sections: a left sidebar, a top header, and a main content area. The sidebar on the left has a dark grey background and contains a list of form controls under 'BASIC' (Text, Number, Dropdown, Checkbox, Radio button, File upload, Date, Email, Rank) and 'ADVANCED' (LAYOUT). A red 'Quick tour' button is at the bottom of the sidebar. The top header is blue and contains the form title 'Special Events - Special Event Permit Reservation Form V2' and three tabs: 'Build' (active), 'Configure', and 'Report'. The main content area is white and shows the 'Submission settings' section. It includes a 'back' button, a description of submission settings, a field for the email address 'specialevents@grcity.us' with a 'Verified' status, a toggle for 'Receive notification for submissions' which is turned on, a field for 'Receiving email addresses' containing 'epittman@grcity.us,kkramer@grcity.us', a field for 'Notification email subject' with the text 'New Special Event Permit Reservation Form Submission', and a field for 'Notification email body' with a preview of the email content. At the bottom of the main content area, there is an 'Insert Tag' dropdown and an 'Add control' button.

Make any changes. Follow the same processes for the various form field types as you did when you first created the form (or reference the manual if you didn't). Remember to save often!

Click the blue *Save and preview* button to test the form

BASIC

- Text
- Number
- Dropdown
- Checkbox
- Radio button
- File upload
- Date
- Email
- Rank

ADVANCED

LAYOUT

Quick tour

Special Events - Special Event Permit Reservation Form V2

Build Configure Report

Eligibility

Is this event a wedding at a City venue or park?

☐ Yes

☐ No

Add links in this format: [Link name][https://openforms.com]

STOP this form and fill out the [Wedding Permit Application](http://beta.grcity.us/Services-Directory/Wedding-Permit-Application)

Your event

What kind of event is this?

☐ Recurring

☐ New

Once you've tested the form successfully, click the purple *Publish* button

BASIC

- Text
- Number
- Dropdown
- Checkbox
- Radio button
- File upload
- Date
- Email
- Rank

ADVANCED

LAYOUT

Quick tour

Special Events - Special Event Permit Reservation Form V2

Build Configure Report

Eligibility

Is this event a wedding at a City venue or park?

☐ Yes

☐ No

Add links in this format: [Link name][https://openforms.com]

STOP this form and fill out the [Wedding Permit Application](http://beta.grcity.us/Services-Directory/Wedding-Permit-Application)

Your event

What kind of event is this?

☐ Recurring

☐ New

Copy the form link and send to GR Digital. We'll test it and replace the old link on the website with your new one.

Special Events - Special Event Permit Reservation Form V2

[Build](#)[Configure](#)[Report](#)

[➤ https://us.openforms.com/Form/10457cd9-97ce-49d0-ae25-e96ac2cf591d](https://us.openforms.com/Form/10457cd9-97ce-49d0-ae25-e96ac2cf591d)